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ABSTRACT

A study was conducted to gather information for the development of a quid-pro-quo agreement between the business community and Chicago high schools. The agreement would provide for the exchange of commitments to school improvement for increased hiring. On-site personal interviews were conducted with 149 local employers/companies in 27 industries. Occupational profiles of 20 occupations were developed that detailed the job tasks, qualifications required, career ladders, and wages. Information was also gathered on recruitment and training practices and anecdotal information on local businesses' relationships with the schools. Data were also used to develop estimates of 1990 employment in 11 of the 20 occupations, projecting openings due to growth and turnover. The survey highlighted three key issues significant for developing a business-education partnership: product quality, product perception, and partner perception. (Extensive appendixes include publicity materials, task analyses and survey verifications for four clerical occupations, and the task lists, both original and locally verified lists, for accounting clerk, typist/word processor, drafter, cook, automotive mechanic, and carpenter, as well as employability skills.) (YLB)

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Illinois
State Board of
Education

Adult,
Vocational and
Technical Education

FINAL PROJECT REPORT:

A STUDY OF

OCCUPATIONAL OPPORTUNITIES

FOR CHICAGO'S YOUTH

NOVEMBER 1987

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Final Progress Report:
A Study of
Occupational Opportunities
for Chicago's Youth

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An Equal Opportunity/
Affirmative Action
Employer

November 1987

27-RF-680
and
NS-I-1-680

FINAL REPORT ABSTRACT
A STUDY OF OCCUPATIONAL OPPORTUNITIES
FOR CHICAGO'S YOUTH
FUNDING AGREEMENT #27-RF-680 and NS-I-1-680

Louise A. Bertsche and
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Time Period Covered: March 23, 1987 - June 30, 1987 and
July 1, 1987 - December 4, 1987

Major Accomplishments of the Project:

The aim of this project was to support the efforts of the Chicago Education Summit in forging a "quid-pro-quo" agreement between the business community and Chicago high schools, exchanging commitments to school improvement for increased hiring. The Chicago Education Summit consists of the chief executives of Chicago businesses, government, civic and community organizations, and secondary and post-secondary educational institutions, thus representing the full spectrum of Chicago's leadership.

This study formed the informational framework for the development of this agreement. It addressed the following areas:

- o Identification of 20 high growth occupations in Chicago that are appropriate targets for high school graduates and offer good wages and career advancement opportunities
- o Identification of local supply and demand for these occupations
- o Development of a list of qualifications necessary for hiring and successful job performance for each of these occupations.
- o Identification and verification of job tasks comprising ten occupations and the related skills knowledge, abilities and traits required for satisfactory job performance.

To collect this information, the National Alliance of Business conducted a survey of local employers in spring, 1987. On-site personal interviews were conducted with 149 companies in 27 industries, yielding a 47 percent response rate.

As a result of this survey, occupational profiles of 20 occupations were developed, detailing the job tasks, qualifications required, career ladders, and wages. Information was also gathered on recruitment and training practices and anecdotal information on local businesses' relationships with the schools.

In addition, the survey data was used to develop estimates of 1990 employment in 11 of the 20 occupations, detailing openings due to growth and those due to turnover. This information will be used as a basis to negotiate the number of hiring commitments to which the business community will be held accountable.

Based upon the information gathered from the survey of 149 local Chicago employers, ten occupations that offer the greatest employment opportunities for Chicago's high school graduates were identified.

DACUM panels of expert workers were asked to identify or verify the job tasks comprising these ten occuations and the related skills, knowledge, abilities and traits required for satisfactory job performance. As a result, four new task lists for state-wide use were developed, and six local task lists for the City of Chicago were verified. These lists will provide an information base for the establishment of training objectives for vocational education based upon local employers' job requirements. As a result, the schools throughout Illinois will have the objective performance criteria needed for competency based curriculum devlopment.

Potential Impact
on Vocational Education:

The project methodology developed under this contract provides a model for the use of other communities in the development of systemic, collaborative partnerships for educational improvement between area schools and the business community. It represents an approach to developing a base of local labor market and occupational information needed to develop realistic goals for educational improvement while at the same time providing a mechanism to foster business-education linkages. The approach embodies the cooperative development of a local informational framework through the active involvement of the key local decision-makers in the research process.

Products
Delivered:

1. "Midterm Report for March 23, 1987 - May 22, 1987," A Study of Occupational Opportunities for Chicago's Youth, three copies to the Illinois State Board of Education, delivered May 22, 1987.

2. "Interim Progress Report for March 23, 1987 - June 30, 1987," (Final Contract Report), A Study of Occupational Opportunities for Chicago's Youth, ten copies to the Illinois State Board of Education, delivered July 30, 1987.

   o "New and Verified Task Lists on Ten Occupations." July 17 - October 30, 1987, A Study of Occupational Opportunities for Chicago's Youth, 15 copies to the Illinois State Board of Education, delivered October 30, 1987.

   o "Final Project Report for March 23, 1987 - November 27, 1987," A Study of Occupational Opportunities for Chicago's Youth, ten copies to the Illinois State Board of Education, delivered, November 25, 1987.

Expenditure of Funds: $40,000 (estimated)

There is no discrepancy between the funding agreement amount and the actual expenditures. 27-RF-280-Phase I and II - March 23, 1987 through June 30, 1987, $42,251.00. NSI-1-280 - Phase III- July 1, 1987 through December 4, 1987, $40827.61. A close-out report will be submitted.

Paid Participants in Activity:

1,2. Louise A. Bertsche, Project Director (7/11/87-9/18/87)
Vincent J. Serritella, Project Director (9/18/87-12/4/87)
Ruth Y. Kim, Project Coordinator
Emily W. Alim, Field Representative, Final Project Report Author
Robert A. Cronberg, Jr., Field Representative
Samuel Bouie, Secretary
Brenda F. McGadney, Project Consultant
Dorothy Mack, DACUM Panel Coordinator

3. National Alliance of Business
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11 E. Adams, Suite 1008
Chicago, Illinois 60603

4. Resumes for the individuals listed above are provided in the appendix.

Resource Listing:

1. Material Resources: labor market information from the Illinois Occupational Information Coordinating Committee, including occupational employment projections, industry employment projections, Dun & Bradstreet Chicago

company listings for selected SIC Codes, and industry-occupation crosswalks.

2. Human Resources: The resource people for this project can be divided into four groups: 1) individuals who participated in the survey 2) members of the Hiring Policy Goals Committee of the Mayor's Education Summit, and 3) individuals who provided general informational resources, and (4) DACUM and Verification Panelists within the ten occupational areas. A list of each group is provided in the appendix.

Major Accomplishments and Significant Findings of the Project:

1. **Description of Accomplishments:**

The charge to the National Alliance of Business was to:

- o Create an information base for the establishment of realistic hiring goals for the business community to increase the employment opportunities for qualified Chicago high school graduates
- o Develop a partnership with the Chicago business community to improve the "learn-to-earn" transition for Chicago high school graduates.
- o Provide an information information base for the establishment of training objectives for vocational education based upon local employers' job requirements.
- o Provide a framework to increase the employment opportunities for qualified Chicago high school graduates.

These goals were achieved through a project design that used an in-person survey format to assess the hiring needs of Chicago employers to establish a comprehensive basis for the development of curriculum and career guidance information designed to serve both Chicago's youth and its businesses.

The DACUM approach was used to develop and/or verify job task lists. Expert workers who were currently within ten occupational areas, identified as being good employment opportunities, were selected to serve on the DACUM panel. A technical review of the task lists were performed by their coworkers and/or the supervisor of the DACUM panelists.

To achieve these goals, the project addressed the following objectives:

- o To identify career ladders, wages, and demand for entry-level occupations that offer local opportunities for employment, competitive wages and benefits, and career advancement to qualified Chicago high school graduates

- o To assess the hiring potential for these occupations and their appropriateness for Chicago's high school graduates

- o To identify or verify the job tasks comprising ten occupations and the related skills, knowledge, abilities and traits required for satisfactory job performance.

- o To establish a basis for competency-based curriculum development and career guidance for Chicago educators.

The first two objectives were the focus of project activities through June, 1987. The remaining two objectives were the focus of project tasks from July through December 1987.

The study design includes three phases of activity. The first phase is the identification of the target occupations using available labor market information. The second phase consists of a survey of local employers to identify the qualifications a person must meet to enter and succeed in these occupations, and to determine the level of employment demand for workers in these occupations. The thrid phase consists of detailed occupational analyses of ten of the original twenty occupations. These analyses are designed to serve as a guide to curriculum development or modification for Chicago schools and throughout the state of Illinois.

a. Purpose of Study

The Hiring Policy Committee of the Education Summit sought to identify occupations that would be realistic targets for employment by individuals graduating from high school and that would serve as an "incentive" to complete high school.

As a first screening of the occupations, we selected occupations that were projected to offer an adequate number of jobs annually, particularly new jobs that represent an increase in the total employment of the occupation. In addition, we sought occupations that already had a sizable employment base or a rapidly increasing base, so that we could ensure adequate job opportunities if the data for Cook County masked Chicago-specific trends differing from Cook County as a whole. These criteria were defined as follows:

- o Level of employment for the occupation equals or exceeds 0.5 percent of total Cook County employ-

ment and the net annual increase in the occupation's employment base represents 175 or more job openings; or

- The occupation's projected growth rate in Cook County between 1982 and 1985 was 20 percent or higher and offers a minimum of 100 job openings annually, due to either employment growth or separation from labor force.

The table on the following page provides these data on each of the occupations selected. After applying the above criteria, additional occupations were eliminated from consideration because the training requirements were clearly inappropriate for new high school graduates or the qualifications required for employment in the occupation do not include a high school diploma.

To select the final 20 occupations, the committee applied four criteria to evaluate each occupation's appropriateness. These criteria are: 1) acceptable wage/salary; 2) career advancement potential; 3) representation in two or more industrial sectors; and 4) reflection of new/recombined functions within the occupations. Each of these criteria was weighted and scaled, allowing scores to be calculated for each. The selection criteria, the rationale for their use, the weight assigned to each, and the scales used are shown in the Appendix. The Appendix also provides the weighted score for each of the occupations considered. It also includes a description of each of the 20 occupations selected. These were:

- Drafters, manufacturing
- Secretaries
- Traffic, shipping and receiving clerks
- Billing, cost, and rate clerks
- Typists/word processors
- Bookkeeping, accounting and auditing clerks
- Payroll and timekeeping clerks
- Receptionists and information clerks
- Carpenter apprentices
- Electrician apprentices
- Plumbers, pipefitter and steamfitter apprentices
- Electrical and electronic technicians
- Automotive mechanics
- Order clerks
- Switchboard operators
- Industrial truck and tactor operators
- General office clerks
- Statistical Clerks
- Cooks, excluding short order
- Entry-level hotel workers.

TABLE I: PROJECTED OCCUPATIONAL EMPLOYMENT SIZE AND GROWTH, 1982 - 1995

OCCUPATION	1982 EMPLOY	% TOTAL EMPLOY	AVG. ANN. JOB OPENINGS	# ANN. NEW JOBS	% ANN. NEW JOBS
Bookkeeping & Accounting Clerks	43,570	(1.71)	2,697	493	18.28
Traffic, Shipping & Receiving Clerks	19,310	(0.76)	864	225	26.04
Secretaries, exc. Hospitals	75,061	(2.95)	4,757	1,835	38.57
Typists	24,817	(0.97)	1,390	464	33.38
General Office Clerks	73,941	(2.90)	4,261	555	13.03
Cooks, exc. Short Order	15,768	(0.62)	906	183	20.20
Carpenters	13,688	(0.49)	794	273	34.38
Electricians	14,235	(0.56)	730	257	35.21
Auto Mechanics	15,185	(0.60)	795	327	41.13
Drafters, Mfg.	4,385	(0.17)	224	43	47.77
Switchboard Operators	11,770	(0.46)	890	259	29.10
Billing, Cost & Rate Clerk	6,149	(0.24)	290	67	23.10
Payroll & Timekeeping Clerk	5,568	(0.22)	298	81	27.18
Receptionists & Info Clerk	9,164	(0.36)	586	186	31.74
Order Clerks	11,865	(0.47)	551	138	25.05
Statistical Clerk	3,393	(0.13)	281	102	36.30
Plumbers, Pipefitters & Steamfitters	9,265	(0.36)	433	106	24.48
Industrial Truck Operators	11,275	(0.44)	290	75	25.86

TABLE I: PROJECTED OCCUPATIONAL EMPLOYMENT SIZE AND GROWTH, 1982 - 1995 (cont.)

OCCUPATION	1982 EMPLOY	% TOTAL EMPLOY	AVG. ANN. JOB OPENINGS	# ANN. NEW JOBS	% ANN. NEW JOBS
Elec. & Electronic Technicians	10,671	(0.42)	517	330	63.83

SOURCE: "Occupational Employment (1982 and 1995) and Average Annual Job Openings, Cook County," Economic Information and Analysis Division, Illinois Department of Employment Security (Provided by IOICC)

b. **Survey Methodology**

1. The second phase of project activities consisted of a survey of local employers. The purpose of the survey was to:

- o Provide employment demand data specific to the City of Chicago, (available labor market information does not examine demand at a level of analysis below the county level)
- o Identify wages, career ladders and qualifications for the target occupations and other high demand occupations identified by local employers
- o Determine current recruitment hiring and training practices of Chicago businesses.

The selection of businesses involved several steps. First, we determined the industries that account for the bulk of occupational employment using an occupation-industry crosswalk, "Occupational Employment Distribution and Employment Change by Industry: 1982 - 1995." Using Dun & Bradstreet's "Business Listings of Firms," we identified the companies employing ten or more employees which represent the industry in Chicago. A stratified sampling technique was used to identify companies representing all of the 20 occupations, providing a mix of locations within the City as well as size of employment. Large employers were given added weight in the selection process as they were viewed as key "potential clients" of the Summit. We excluded the companies with under ten employees as they were considered unlikely to offer stable employment.

A total of 342 companies in 28 industries were sent letters of introduction signed by 6 Chicago CEO's in the late March through mid-April, 1987. Of these, 25 companies could not be contacted, had moved from Chicago, or represented a division of another company in the survey. On-site interviews were conducted with 149 companies in 27 industries yielding a 47 percent response rate.

Two events occurred during this same time frame that may have prevented a higher response rate. First, the letter of introduction highlighted the sponsorship of the City of Chicago and was sent out during the last days of the mayoral campaign. Several potential respondents indicated they viewed the survey as an election issue. Secondly, the deadline for income tax returns was April 15th, and the additional workload this represented prevented several small businesses and accounting firms from participating. Table III provides further detail on the reasons companies gave for not participating. The interviews were conducted in April and May, 1987.

Table IV provides descriptive data on the companies included in the survey. Slightly over one-half of the companies are small

TABLE II:
SURVEY PARTICIPATION

INDUSTRY(SIC)	CONTACTED	COMPLETED
152 General Building Contractors - Residential Buildings	5	0
171 Plumbing, Heating, and Air Conditioning	9	2
173 Electrical Work	9	1
175 Carpentering and Flooring	6	1
205 Bakery Products	7	2
275 Commercial Printing	11	3
344 Fabricated Metals	4	0
346 Metal Forgings and Stampings	9	5
354 Metalworking Machinery and Equipment	8	4
366 Communication Equipment	5	2
501 Motor Vehicles and Automotive Parts and Supplies	4	1
506 Electrical Goods	9	5
508 Machinery, Equipment and Supplies	23	6
531 Department Stores	6	2

INDUSTRY(SIC)	CONTACTED	COMPLETED
554 Gasoline Service Stations	3	2
581 Eating and Drinking Places	35	13
596 Nonstore Retailers	3	1
602 Commercial and Stock Savings Banks	11	8
641 Insurance Agents, Brokers	12	5
701 Hotels, Motels and Tourist Courts	9	5
731 Advertising	11	9
733 Mailing, Reproduction, Commercial Art and Photography, and Stenographic Services	10	4
739 Miscellaneous Business Services	64	31
806 Hospitals	13	12
811 Legal Services	28	11
866 Religious Organizations	8	1
893 Accounting, Auditing and Bookkeeping Services	13	8
Governmental Agencies	7	5
Total	342	149

TABLE III: REFUSALS BY REASON GIVEN

Refusal Reason	# Responses*	% of Total
Not interested	38	28.3
Too busy/no time available	34	25.4
Could not participate until after survey and date	15	11.2
Organizational/financial difficulties	10	7.5
Company "too small"	10	7.5
Don't hire recent high school graduates	6	4.5
Workers or company not in Chicago	5	3.7
Satisfied with recruitment source	4	3.0
Not hiring	4	3.0
Agreed, then refused after receiving more information	4	3.0
Agreed, then supervisor vetoed particpation	2	1.5
Not of direct benefit to company	2	1.5
TOTAL REASONS GIVEN	**134**	**100.1%+**

* Several companies gave more than one reason for refusing to participate; therefore, the total exceeds the number of companies refusing to participate.

\+ Responses total to over 100 percent due to rounding off of percentages for each response category.

TABLE IV:
SUMMARY OF SURVEY PARTICIPANTS

SIZE OF EMPLOYMENT

SIZE OF COMPANY	# OF COMPANIES	% OF TOTAL
0-10 employees	9	6.0%
11-49 employees	32	21.5%
50-249 employees	34	22.8%
250-499 employees	24	16.1%
500+ employees	50	33.5%

AGE OF COMPANY

YEARS IN BUSINESS	# OF COMPANIES	% OF TOTAL
Less than 5 years	8	5.4%
6-20 years	24	16.1%
More than 20 years	117	78.5%

LOCATION OF COMPANY

GEOGRAPHIC LOCATION	# OF COMPANIES	% OF TOTAL
Central Business	35	23.4%
Outer Central Business	48	32.2%
North	17	11.4%
South	11	7.3%
West Central	7	4.6%
North West	18	12.0%
Far South	5	3.3%
South West	6	4.0%
O'Hare & Other	2	1.3%

in size, employing less than 250 employees. Most had been in business for over 20 years, with just over 5 percent reporting 5 or fewer years in business. Nearly 56 percent of the companies were located in the Loop or its immediate environs, with nearly 15 percent in the south or southwest sides, over 24 percent in the north or northwest sections of the city, and nearly 5 percent on the west side. This pattern reflects generally the patterns of employment in Chicago as reported in Where Workers Work, 1984, produced by the Illinois Department of Employment Security. Sections III, IV, V and VI detail the survey findings.

2. The Hiring Policy Goals Committee of the Mayor's Education Summit has identified ten occupations the survey show are particulary good targets for employment of high school graduates. There were:

- o Order Clerk
- o General Office Clerk
- o Billing, Cost and Rate Clerk
- o Shipping/Receiving Clerk
- o Drafters, manufacturing
- o Cooks
- o Accounting Clerk
- o Typist/Word Processors
- o Automobile Mechanics
- o Carpenters

The third phase of project activities consisted of the development of new and verified task lists of the above occupations. The need of the State Board of Education to increase its number of task lists and the need of the Chicago Public Schools for task list verification were the key criteria in the selection of the occupations.

The first four occupations were selected for task list development. These occupations offer good employment potential in Chicago, and no Illinois task lists exist for them. The four task lists were developed using the DACUM approach. DACUM panelists were procured and consisted of between eight to twelve expert workers within an occupational area. These workers were identified based upon employers' interest and willingness to participate in the survey. Each of the four panels were conducted by a trained facilitator and required a full day and one half. In addition to the standard DACUM agenda of analyzing duties and associated tasks, the identification of the frequency, importance and learning difficulty of each task was included. The DACUM panelists were asked to identify job competencies such as knowledge, skills and abilities required to perform the job successfully, as a basis for competency-based curriculum development. Approximately one week after the panel was conducted, each panelist was mailed a task analysis and survey verification form which consists of a list of Task Statements and Job Competencies they had identified during the task development process. Each panelist was asked to rank the importance of each skill competency area on a five point scale. Addi-

tionally, panelists were requested to add other skill/competency areas not included on the list. As a result, we have identified not only the job tasks but also the skills, knowledge and abilities needed to perform those tasks. The four occupations for which task lists were constructed include business representatives from Chicago only. The DACUM panel, with this panel structure, ensures a locally valid task list.

Teachers and administrators from the Chicago Public Schools and the City Colleges of Chicago were invited to observe the DACUM panels in process so that they could gain more detailed information on the occupations.

The National Alliance of Business worked in cooperation with the Chicago Public Schools to conduct the local verification of the six following occupations:

1) Accounting Clerk
2) Typist/Word Processor
3) Drafter
4) Cook
5) Automobile Mechanic
6) Carpenter

Verification panels were conducted by a trained facilitator from the Chicago Public Schools at sites which they provided. These panels consisted of between four to eight participants currently working in the occupation. The National Alliance of Business was responsible for identifying and securing panel members and garnering their committment to participate. Verification panelists received a $100.00 honorarium for their services, which was paid by the Public Schools. The panel required one full day. Participants were required to verify task lists originally established by the State Board of Education. Lists of the following are included in the appendix: 1) DACUM task analysis and survey verification for four occupations; 2) the original task lists and the locally validated task lists for six occupations; 3) a list of the employability skills required to perform the occupation.

2. **Product Abstract:** The four major products of this project include:

a) Midterm Report - this report focused on project activities conducted during the first two months which concentrated on research undertaken to develop and implement the survey.

b) Interim Report - this report focused on project activities undertaken under both Phase I and Phase II of the contract. The report summarized the findings from the survey.

c) New and Verified Job Task Lists - were provided on ten

occupations which were determined to be good employment opportunity for high school graduates.

d) Final Project Report - a summary report of all project activities undertaken throughout the duration of the contract period (March 23, 1987 - December 4, 1987.

3. **Major Dissemination Activities Summary:** The final project report will be distributed by the National Alliance of Business to the Chicago Public Schools and the City Colleges of Chicago. The National Alliance of Business wishes to extend its original dissemination plan. Due to the overall significance of the project findings, an executive summary will be mailed to the following:

   1. Survey Employers
   2. Chicago Corporate Leaders
   3. Mayor's Education Summit Members
   4. Chicago Partnership for Education Progess Members

4. **Staff Development:** Training was provided on the administration of the survey instrument and interviewing techniques. Training lasted approximately one-half day.

5. **Publicity:** Summarized below are the newspaper articles which appeared on the Chicago Education Summit. Copies of these articles are attached.

"School Plan Calls for Local Control," Chicago Tribune, November 10, 1987.

The Chicago business' proposal of committing 5,000 jobs by 1992 to Chicago public high school graduates in return for specific achievement goals was met by a counter proposal by the Chicago Public Schools of 6,000 jobs by 1988 and help in securing $100 million in additional tax revenues. A school reform proposal is being drafted by a local public affairs firm to give Chicago's public schools the autonomy to operate as an individual business. Endorsement for the proposal is being sought from local businesses.

"What Happened to Class of '85?" Chicago Tribune, November 10, 1987.

Statistics on the whereabouts of 1985 Chicago high school graduates were presented. The information was gathered by the Hiring Policy Goals Committee of the Education Summit to gain insight of the employment of Chicago's youth.

"Strike, Learning Goals Stall School-Biz Pact," Crain's Chicago Business, September 21, 1987.

Hopes of implementing a "Compact" for Chicago's public schools for the 1987-88 academic year have been stalled by the

teacher's strike and the inability to obtain a commitment from Superintendent Manford Byrd. Mixed responses were reported from the business partners of the pact.

"Education Reform May Be Too Late," Crain's Chicago Business, June 22, 1987.

This editorial commends the efforts of the Learn-Earn Partnership (Education Summit) while pointing out some of its shortcomings. The writer sees a more radical solution, privatization of public education, as a more appropriate means of school improvement in Chicago.

"Mayor's Plan: Link Jobs to Diplomas," Chicago Tribune, May 5, 1987.

The formation of the "Chicago Partnership" to set goals and timetables for school improvement and youth employment was announced by Chicago Mayor Harold Washington. Peter Willmott, chairman and chief executive officer of Carson Pirie Scott & Company, will head the "Partnership." It is hoped that a program will be in place for the new school year.

"Business and the Schools Crisis," Crain's Chicago Business, March 16, 1987.

Examples of business-education initiatives from several cities and states were presented to illustrate business' economic stemmed concern for education. Although a diversity of approaches are utilized, there is an underlying "concensus that public education simply can't be permitted to degenerate further." Three Chicago initiatives, the Education Summit, the Job Readiness Program, and the Project Beethoven were discussed.

"Let's Privatize Chicago's Schools," Crain's Chicago Business, March 16, 1987.

Placing education in a competitive marketplace is the thrust of this editorial. The writer feels that education needs to be run like a business where survival or failure is based on the merits of the schools. If a school system does not perform, it does not deserve to survive.

"Chicago Business' Interest in Education a Good 1st Step," Chicago Tribune, December 22, 1986.

This commentary views the "partnership" between Chicago's business and civic community to bring about educational reform and job apportunities for high school graduates as a test of the business-city partnership "rhetoric" despite its many hurdles.

"Promising Idea to Cut School Dropouts," Chicago Tribune, December 18, 1986.

Whether or not Chicago's Education Summit is meant to be a bragging point for Mayor Harold Washington's re-election campaign, this editorial gives its support to the effort.

"'Summit' Groups Sift Ideas in Quest to Help Students," Chicago Sun-Times, December 17, 1986.

This article describes some of the ideas and questions raised by the Education Summit participants to the issue of increasing the employability and employment of Chicago's youth. Contract negotiations are scheduled to begin in March, 1987.

"Business and Schools Map Guaranteed Job Pack for Grads," Chicago Sun-Times, December 16, 1986.

Hal Baron, Mayor Harold Washington's senior policy adivsor, announced an initiative of forming agreements between representatives of Chicago's corporate community and the Board of Education, using the guarantee of employment as an incentive for youth to stay in school. Information was presented to support the need of such an effort.

"Working Business Into School," Chicago Tribune, December 16, 1986.

The disclosure of an "education summit" convened by Mayor Harold Washington to negotiate a set of agreements between the Chicago Board of Education and business to address the issues of Chicago's school dropout and youth employment rates was made. While similar to the Boston Compact, Chicago's effort will seek to go beyond and include initiatives directed to those persons who have already left the school system. The target date for agreements is mid-March, 1987.

Problems:

It proved exceedingly difficult to obtain information from building trade contractors on plumbers, electricians and carpenters through the survey. We were able to obtain information on carpenters from the Building Trades Association; however, we were unsuccessful in obtaining information on plumbers and electricians. We also had difficulty obtaining sufficient data for nine of the twenty target occupations on current and projected levels of employment to serve as a base for the development of hiring commitment goals from Chicago business.

The DACUM panel scheduling was an extremely timely process. In that the panelists participation was voluntary, we often experienced last minute cancellations. Additionally, seven occupation titles (i.e. General Office Clerks) were too general. Several panelists with different titles, but whose job description was the same or closely related to the DACUM panel occupational area, were selected. Additionally, finding unionized carpenters to participate in the Verification Panel was also difficult; however, three were secured.

Summations of Evaluation Data Collected: No evaluation data was collected under this contract

Statement of Impact:

The development of an agreement for educational improvement, reflecting substantive commitments by the schools and the Chicago business community, is well underway. The study described in this report has been accepted as a foundation and guide in developing an agreement. The Chicago Partnership, the entity responsible for negotiating for the business community, will use the study as its information base.

The Chicago Public Schools administration was actively involved in the planning of project activities. In this manner the study, while primarily a research venture, has served as an important basis for cooperation between businesses and the schools. The study design built in regular meetings to update the Hiring Policy Committee on study activities and gain their comments, suggestions, and decisions on key decision points.

The DACUM Panel approach provided a competency-based curriculum design. As a result, the schools throughout Illinois will have objective performance criteria which serves as a powerful lever in improving sex equity in hiring and training for employment. This study serves to replace subjective judgement of qualification and skills needed for task performance, with objective and valid criteria. The study is viewed by the committee as their own, leading to greater acceptance of its findings and more informal marketing of the study as a basis for decision-making by the business people themselves.

In this way, the project has been extremely successful in achieving its impact objectives:

- To develop a framework for a lasting business-education partnership directed to improving the "learn-to-earn" transition in Chicago high school graduates

- Establishing a baseline for developing realistic hiring goals.

- o Provide an information base for the establishment of training objectives for vocational education based upon local employer job requirements.

- o Provide a framework to increase the employment opportunities for qualified Chicago high school graduates.

Conclusions and Recommendations:

1. Target Occupations

The study investigated 20 target occupations that seemed to offer good entry wages, career advancement opportunities, and stability of employment. Because the only labor market information available is based upon County employment rather than City-specific data, some differences were anticipated between the secondary data and the survey data. In fact, this assumption held true. Switchboard operators, shipping and receiving clerks, and cooks proved to have a significantly lower employment growth than originally anticipated.

Some of the target occupations, such as receptionists and switchboard operators, do not offer the career advancement opportunities thought to exist for these positions. The remaining occupations do meet the selection criteria established by the Hiring Policy Goals Committee.

Ten of these occupations, were chosen by the Hiring Policy Goals Committee of the Education Summit, and were investigated at a level of detail sufficient to serve as the basis for curriculum development and refinement. Possible criteria to apply in this selection process might include the revised weighted scores of these occupations on the original selection criteria as well as the interest and needs of the Chicago Public Schools.

2. Key Issues

The survey highlighted three key issues that are significant for developing a business-education partnership. These three issues are:

- o "Product Quality": employers' evaluation of the employability of recent Chicago high school graduates

- o "Product Perception": the preconceived notions and biases of the capabilities of Chicago high school graduates, biases that may be at variance

with actual "product quality"

- o "Partner Perception": the employers', perceptions of the schools as a partner; their view of the schools commitment and ability to follow-through on common goals.

These issues are considered below, with a Chicago high school graduate considered as the product of the school system, a product for which the Summit intends to increase "product sales" (i.e., hiring). In the discussion below, these issues are considered in the context of principles of product development and marketing.

a. Product Quality

Survey results indicate that Chicago employers view the products of the Chicago Public Schools as inferior, in that they do not "measure up" to their hiring criteria. Specifically, they cite a lack of both basic skills as well as knowledge of appropriate business behaviors, employer expectations, and realistic employee expectations.

The survey began the process of identifying employers' hiring and job performance criteria for the target occupations. Phase III provided an in-depth occupational analysis of job tasks and related skills, knowledge and abilities needed for job performance in a form used by the Chicago Public Schools' curriculum development specialists. The information consists of employers' own reports of their requirements, translated into a "language" understood and used by the Chicago Public Schools.

This information was at a sufficient level of detail that it can be used to determine whether or not these requirements are being met currently by the schools, and to identify any gaps or disparities that may exist.

b. Product Perception

The survey results, as discussed above, indicate that employers have developed a preconceived judgment of the qualifications of a Chicago high school graduate, reporting that the south suburban and/or parochial schools supply more qualified job candidates. Additional study is needed to identify how much of this perception is a reflection of objective qualifications and how much is solely an issue of perception, not fact.

To the extent that a preconceived negative assessment exists, product performance becomes particularly

critical: any reinforcement of the negative image becomes more powerful than poor performance would be in a neutral or positive image environment. A close correspondence between the quality of the program graduates in relation to the marketing/sales message is critcal in this environment.

c. Partner Perception

The efforts of the Chicago Education Summit have been directed toward the development of a public-private partnership with the aim of increasing the access of Chicago high school graduates to employment. The survey points out that Chicago employers view the Chicago Public Schools with some skepticism in a partnership role.

Several employers referenced working relations that formerly existed with the schools. Employers cite a lack of follow-through by the school representatives as the cause for the end of these programs. It may be that funds supporting these programs were reduced or that there is some other factor besides school personnel's inattention that has led to the demise of once active business-education relations. Whatever the reason may be, it is clear that employers feel the relations died because of a lack of commitment on the part of the schools.

At least two of the employers surveyed reported that their relationships with the schools exist despite administrative obstacles created by the schools, as the result of proactive business leadership. School personnel were viewed as passive, reactive partners in these efforts.

There are, however, the building blocks for successful cooperation. Employers responded enthusiastically to a program model that links job-specific training and work experience at a company with classroom training at the school. They view this model particularly favorably if it includes a strong personal relationship of trust between a high school counselor (or other school representative) and the employer. This personal foundation was cited as a basis on which a company might take a hiring risk on someone the company would not ordinarily hire. Efforts to build on existing positive features and to pinpoint obstacles to business education partnerships can serve as a basis for creating a more positive partnership environment.

Individual Success Story: Not applicable

APPENDICES

I. Target Occupations for Chicago Occupational Opportunities Study

II. Mayor's Education Summit Principles Letter

III. Publicity (Summit Articles)

IV. Project Staff Resumes

- Vincent J. Serritella
- Louise A. Bertsche
- Emily W. Alim
- Ruth Y. Kim
- Robert A. Cronberg, Jr.

V. DACUM Panel Analysis and Survey Verification

- Billing, Cost & Rate Clerk
- Shipping & Receiving Clerk
- General Office Clerk
- Order Clerk

VI. Verification Panel Task Lists (original and locally verified lists)

- Accounting Clerk
- Typist Word Processor
- Drafter
- Cook
- Automatic Mechanic
- Carpenter
- Employability Skills

Target Occupations
for Chicago Occupational Opportunities Study

1. **JUNIOR DRAFTERS, MANUFACTURING:**

Prepare clear, complete, and accurate working plans and detail drawings from rough or detailed sketches or notes for manufacturing purposes according to specified dimensions. Utilize knowledge of various machines, engineering practices, mathematics, building materials, and other physical sciences to complete drawings.

Drafters are increasingly using computer-aided design systems to create their drawings. Drafting offers a good career path, with junior drafters advancing to checkers, detailers, senior drafters, designers and supervisors.

2. **SECRETARIES, ENTRY-LEVEL:**

Relieve officials of clerical work and minor administrative and business detail by scheduling appointments, giving information to callers, taking dictation, composing and typing routine correspondence (using typewriter or word processor), reading and routing incoming mail, and filing correspondence and other records. May perform various other assigned clerical duties.

3. **TRAFFIC, SHIPPING, AND RECEIVING CLERKS:**

Verify and keep records on incoming and outgoing shipments and prepare items for shipment. Duties include assembling, addressing, stamping, and shipping merchandise or material; receiving, unpacking, verifying, and recording incoming merchandise or material; and arranging for the transportation of products. This occupation excludes laborers, stock clerks, and workers whose primary duties involve weighing and checking. This occupation increasingly involves the use of automated equipment for inventory control and other recordkeeping purposes. This position offers a good opportunity for new workers to learn about the company's products and business practices. Clerks may be promoted to head shipping and receiving clerk, warehouse manager or purchasing agent.

4. **BILLING, COST AND RATE CLERKS:**

Compile data, compute fees and charges, and prepare invoices for billing purposes. Duties also include computing costs and calculating rates for goods, services, and shipment of goods; posting data and keeping other relevant records. May involve use of typing, adding, calculating, and bookkeeping machines.

Workers whose primary duty is operation of special office machines are classified as Billing, Posting, and Calculating Machine Operators. Workers calculating charges for passenger transportation are classified as Reservation and Transportation Ticket Agents.

5. TYPISTS:

Type letters, reports, stencils forms, addresses, or other straight copy material from rough draft, corrected copy, or voice recording. May perform other clerical duties as assigned. Many typists use word processing equipment.

6. BOOKKEEPING, ACCOUNTING, AND AUDITING CLERKS:

Compute, classify, and record numerical data to keep sets of financial records complete. Perform any combination of routine calculating, posting, and verifying duties to obtain primary financial data for use in maintaining accounting records. May also check the accuracy of figures, calculations, and postings pertaining to business transactions recorded by other workers. Workers whose primary duty is operation of special office machines are not icluded in this occupation.

This occupation increasingly requires the use of computer-based spreadsheet programs. Newly hired bookkeeping workers begin by recording routine transactions such as accounts payable or accounts receivable. As they gain experience they advance to more responsible assignments, such as preparing income statements, reconciling accounts, and reviewing computer printouts. Bookkeeping clerks can be promoted to supervisory jobs, and, with additional education, to accountant positions.

7. PAYROLL AND TIMEKEEPING CLERKS:

Compute wages and post wage data to payroll records and/or keep a daily record showing time of arrival and departure from work of employees. Compute earnings from timesheets and work tickets using calculator. Operate posting machine to compute and subtract deductions. Enter net wages on earnings record card, check stub, and payroll sheet.

8. RECEPTIONISTS AND INFORMATION CLERKS:

Answer inquiries and obtain information for general public (customers, visitors, and other interested parties) concerning activities conducted at an establishment, or office location or concerning persons within firm, departments within store, or services within hotel. May perform variety of other clerical duties. This occupation excludes receptionists who operate switchboards.

9. CARPENTER APPRENTICES:

Perform the carpentry duties necessary to make or repair wooden structures, structural members, and fixtures and equipment using carpentry tools and woodworking machines. This occupation excludes cabinetmakers and bench carpenters.

Apprenticeship programs generally are three to four years in length and are offered locally by the Associated Builders and Contractors, Inc., the Associated General Contractors, the United Brotherhood of Carpenters and Joiners, and the National Association of Home Builders.

10. ELECTRICIAN APPRENTICES:

Install, maintain, and repair wiring, electrical equipment, and fixtures. Insure that work is in accordance with relevant codes. May read blueprints. This occupation includes Portective Signal Installers and Repairers and Street Light Servicers.

Applicants to apprenticeship programs generally must be 18 years old. The apprenticeship program requires four years, which includes 144 hours of classroom instruction in addition to on-the-job training.

11. PLUMBERS, PIPEFITTERS, AND STEAMFITTERS APPRENTICES:

Assemble, install, alter and repair pipe systems (metal, plastic, ceramic, composition, etc.) that carry water, steam, air, or other liquids or gases.

Apprenticeship programs are available through the United Association of Journeymen and Apprentices of the Plumbing and Pipefitting Industry, the Mechanical Contractors Association of America, Inc., the National Association of Plumbing-Heating-Cooling Contractors and Associated Builders and Contractors. Apprenticeships consist of four years of on-the-job training in addition to at least 216 hours annually of related classroom instruction.

12. ELECTRICAL AND ELECTRONIC TECHNICIAN TRAINEES:

They develop, manufacture and service electronic and electrical equipment and systems such as radios, radar, sonar, televisions, industrial and medical measuring or control devices, navigational equipment and computers. They use sophisticated measuring and diagnostic devices to test, adjust and repair equipment. Employers may prefer applicants with specialized technical training. Two-and four-year apprenticeship programs exist to meet this need.

13. **AUTOMOTIVE MECHANIC ASSISTANTS:**

Automotive mechanics adjust, repair, and overhaul automotive vehicles. May be designated according to specialties, such as Brake Repairers, Transmission Mechanics, or Front-end Mechanics. This category excludes Auto Body Repairers, Bus and Truck Mechanics, Diesel Engine Specialists, and Electrical Systems Specialists.

A knowledge of electronics is becoming increasingly important as electronic controls are being designed into automotive components. A few apprenticeship programs may be available through motor vehicle dealers and independent repair shops.

14. **ORDER CLERKS:**

Receive and process incoming orders for materials, merchandise, or services such as repairs, installations, or rental of facilities. Additional duties include informing customers of receipt of order, prices, shipping dates, and delays; preparing contracts; and handling complaints.

15. **SWITCHBOARD OPERATORS/MESSAGE CENTER OPERATORS:**

Operate cord or cordless switchboard to relay incoming, outgoing, and interoffice calls. May supply information to callers and record messages. In addition to performing duties of Switchboard Operator, may also act as receptionist and perform routine clerical work and typing.

16. **INDUSTRIAL TRUCK AND TRACTOR OPERATORS:**

Operate gasoline-or electric-powered industrial trucks or tractors equipped with fork lift, elevated platform, or trailer hitch to move materials in an establishment, warehouse, storage yard, factory, or at a construction site. Occupation excludes Logging Tractor Operators. The survey will identify what impact, if any, the use of automated material handling systems is having on this occupation in Chicago.

17. **GENERAL OFFICE CLERKS:**

Workers are classified as General Clerks only if their duties are too varied and diverse to be classified in any specific office clerical occupation. Clerical duties may be assigned in accordance with the office procedures of individual establishments and may include a combination of bookkeeping, typing, stenography, office machine operation, and filing.

18. STATISTICAL CLERKS:

Compile and compute data according to statistical formulas for use in statistical studies. May also perform actuarial computations using algebra and trigonometry and compile charts and graphs for use by Actuaries. This occupation includes Actuarial Clerks.

19. CHEF TRAINEES:

Assist cook in the preparation, seasoning, and cooking of soups, meats, vegetables, desserts and other food in restaurants or institutions such as schools, hospitals or cafeterias. This occupation excludes short-order cooks.

20. HOTEL ENTRY OCCUPATIONS:

The Hotel and Restaurant Employees Union has enthusiastically endorsed the Hiring Policy Committee's concept of creating career ladders within the Hotel industries that allow qualified Chicago high school graduates to progress upward from such entry-level positions as bellhop and front-desk receptionist.

21. OCCUPATIONS NOT SELECTED:

The following occupations were considered but scored less highly than the occupations above for the reasons noted:

- Operating engineer apprentice (industry representation)
- Computer operator (industry representation)
- Peripheral EDP equipment operator (industry representation)
- Retail salesperson (wage)
- Packaging and fill machine operator (wage).

CITY OF CHICAGO
OFFICE OF THE MAYOR

Harold Washington
Mayor

June 17, 1987

To: Summit Principals and Work Group Participants

From: Hal Baron, Chief Policy Advisor HB

Re: Mayor's Education Summit Status as of June 15, 1987

OVERVIEW

The January 20th meeting of Mayor Washington's Education Summit decided to concentrate on a first round of agreements that could be ready for implementation with the opening of the school year in September. Following this guidance, the Steering committee selected three proposals from the Work Groups for the first round:

- "Hiring Compact" - to place high school graduates in jobs with a career potential.
- "The Literacy Ladder to Jobs" - To improve the skills and provide job incentives to dropouts and those who graduated.
- "Passport to Excellence" - to strengthen parent and community involvement in and support for the educational process.

Negotiation of the agreements are to be conducted by the parties that will implement them.

On June 8 the negotiations on the "Hiring Compact" commenced. The Steering Committee has targeted July 1 for commencement of "Literacy Ladder" negotiations and July 15 for "Passport to Excellence."

WORK GROUPS

Through sustained efforts and commitment our six Work Groups developed eleven action-oriented proposals to address the employment and employability of Chicago's youth following the guidelines framed by the Mayor and the Summit (see attachment). The Steering Committee then selected the three above mentioned proposals from the eleven for discussion in the first round of negotiations. The remaining

proposals will be considered for inclusion in a second round of agreements after the successful launching of the first three agreements.

These Work Groups have benefited from the participation of some 140 persons under the very able leadership of their chairpersons. A Steering Committee - comprised of the chairpersons, Mayor's Office representatives, and at-large members from the Board of Education, Chicago City Colleges, the Archdiocese Board of Education and the Chicago Teachers Union -- has coordinated this activity. The Steering Committee will provide assistance and exchange of information between the three negotiating processes this summer.

We look forward to a September meeting of the Summit principals to review and ratify the results from the negotiations between the various parties.

NEGOTIATIONS - ROUND ONE

In what is truly an historic first in Chicago, the negotiating teams of the Chicago Board of Education, the Chicago business community (represented by the Chicago Partnership for Educational Progress) and the Mayor's representatives met in the Mayor's Conference Room and expressed a renewed sense of hopefulness in the process they were embarking on together. The newly formed Chicago Partnership, established to coordinate eight business organizations around a more effective civic agenda, gave impetus to the business negotiating team headed by Peter Willmott, Chairman of the Board, Carson Pirie Scott and Company. The Board of Education team, headed by Board Chairman Dr. Frank Gardner, noted the new spirit of enthusiasm and fresh commitment that they felt at the negotiating table. With Rev. Kenneth Smith, as facilitator, the first negotiating session ended with an agreement on a statement of purpose and a process of not more than five sessions to fashion action agreements by September.

"HIRING COMPACT" PROPOSAL

This first round of negotiations will begin with the proposed Challenge for Employment Program developed by the Hiring Policy Goals Work Group: 1) the schools will prepare the students competently for today's work world; and 2) employers will provide preference to Chicago's competent youth. The Hiring Work Group developed recommendations for achieving these goals. Starting from these proposals, the parties at the table will craft the actual procedures they will implement as part of the agreement.

NEGOTIATING THE OTHER PROPOSALS

The Steering Committee has set targets for commencing negotiations on the "Literacy Ladder for Jobs (July 1) and the "Passport to Excellence" proposals (July 15). Sub-committees are working to identify the relevant parties that will sit at each of

these tables. Included in this preparatory work is the focusing of the proposals so they initiate workable programs that can be expanded over the years.

CONCLUSION

The Education Summit has made substantial progress towards its goal of producing agreements for measurable enhancement of the employability and employment of Chicago's young people. I anticipate sending you another status report towards the end of August with substantial additional achievements. At that time we hope to set a date for the meeting of Education Summit principals.

I welcome comments, feedback and other suggestions any time.

Attachment 1

BRIEF DESCRIPTION - WORK GROUP PROPOSALS

A. Business Support Work Group

"Adopt"-A-Kid

Adopt-A-Kid is a mentorship program which seeks to identify young people at risk of dropping out of school, and who have otherwise demonstrated an exceptional probability for academic success. These individuals are paired with a business representative who offers support and guidance through individual tours, personal relationships, and other activities geared toward fostering a greater awareness/appreciation of high school completion and future employment opportunities.

Corporate Buyer/Supplier Partnership

This proposal seeks to increase the number of companies involved with the Education Summit by encouraging large businesses located outside the city limits to take a leadership role in soliciting their Chicago based suppliers. Business support could include in-kind services, equipment, cash, or jobs.

*Adopt-A-Teacher Program

This proposal seeks to encourage business and industry to adopt a teacher for one semester. The teacher will be exposed to new technology and new methods used in the real work place. In return, the teacher will perform assigned tasks which will contribute to the productivity of the company.

*Business/School Partnership: A Collaborative Model

The Business/School Partnership is a collaborative model between Loop businesses and Jones Metropolitan High School of Business and Commerce to develop a supply of well trained future workers. Changes mandated by this model include restructuring the business curriculum in the schools; and providing pre-employment and employment opportunities for students.

*Note: Proposal submitted after Steering Committee meeting.

B. Literacy/Job Training Work Group

OJT for Out-of-School Youth

This proposal targets drop outs performing at approximately the 9th grade level and provides entry level employment. The participants gains valuable work experience that could lead to a better paying job with a future. a key aspect involves linking the initial employment to participant enrolling in basic skill training courses, culminating in a GED or high school diploma.

Community Learning Centers for Out-of-School Youth

Community Learning Centers for Out-of-School Youth represent an opportunity for high school dropouts to re-enroll in an educational program. The learning centers would offer smaller classrooms or individualized instruction. They would also link literacy and basic skills instruction with support services, job training, and part-time employment to encourage youth participation and increase long-term employability. Youth who remain in the program and achieve two or three grade level gains would be eligible for the on-the-job training program.

C. School Improvement Goals Work Group

The work group submitted a list of proposed objectives for system-wide school improvement. The bulk of these objectives are predicated on the Chicago Public School System raising achievement patterns commensurate with national norms. Various benchmarks have been established to meet the proposed objectives, including a five (5) year target.

D. Hiring Policy Work Group

Strengthen the Cooperative Education program

This series of proposals provides additional structure and accountability for the Chicago Public Schools cooperative education program. The proposals call for the establishment of a database for the program to determine program impact; an education advisory committee to coordinate, advise, monitor, and facilitate the cooperative education experience in the Chicago Public Schools; and the development of an effective staffing model to provide each high school with adequate staff to implement a broad based program for their student population.

Hiring Compact (Challenge for Employment Program - CEP)

This series of proposals establishes a "hiring compact" whereby employers guarantee to provide a set number of jobs to high school graduates who perform at specified levels. Specific proposals involves: surveying area businesses in order to identify growth industries, and the types of basic skills, abilities, and work competencies that are needed by high school graduates to qualify for entry-level "growth" jobs; a three (3) to five (5) year implementation schedule; and the structur eof a third party management organization to oversee implementation of the hiring compact.

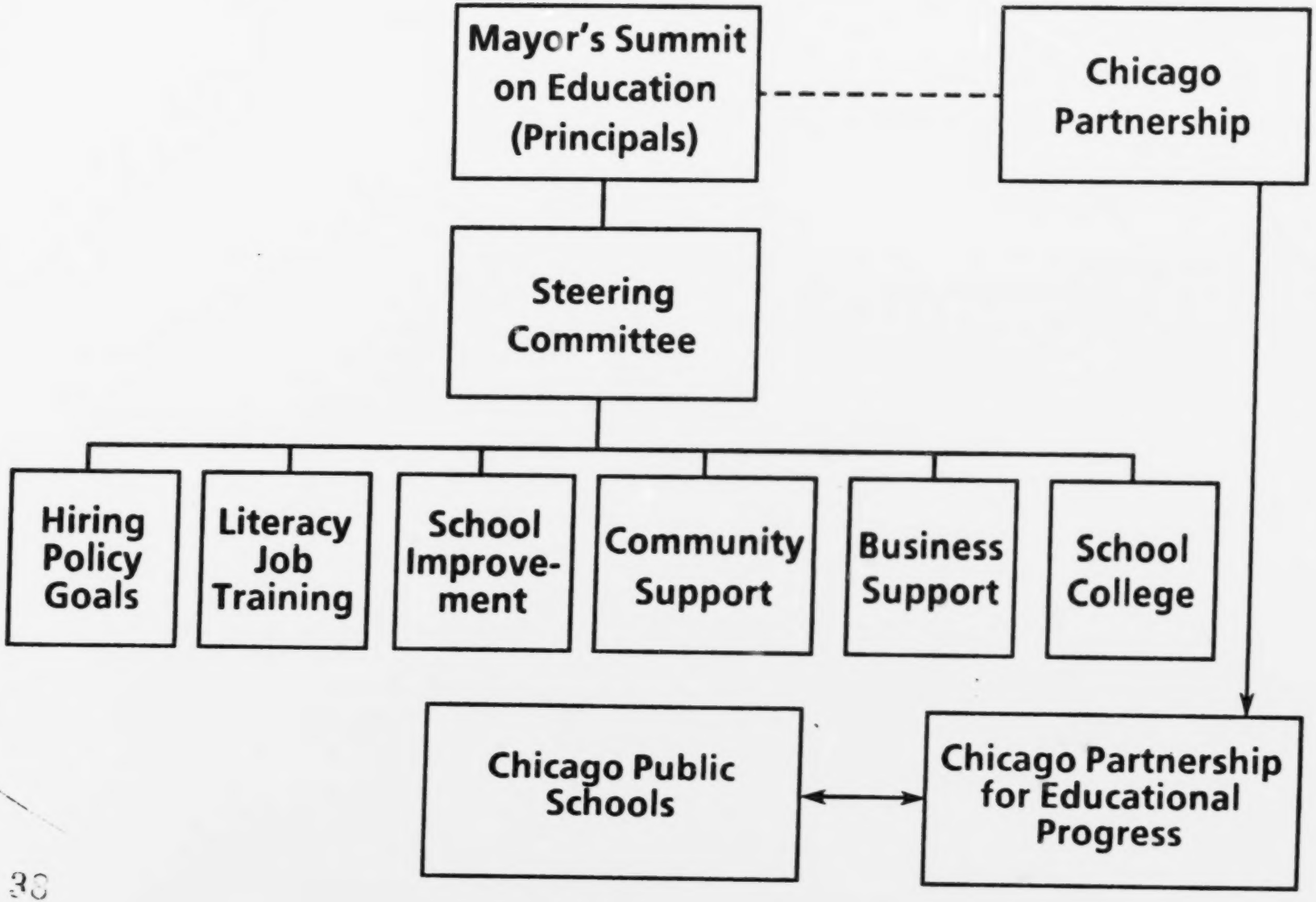
Establishment of a Reporting System on High School Student Outcomes

The objective of the proposal agreement is the establishment of an automated database of the post-high school outcomes of recent chicago high school attendees. The data should be collected in January on youth who graduated from the Chicago public high schools the preceding June. Data items collected should include: enrollment in two and four year universities; enrollment in the military; full time employment; part-time and temporary employment; and salary information.

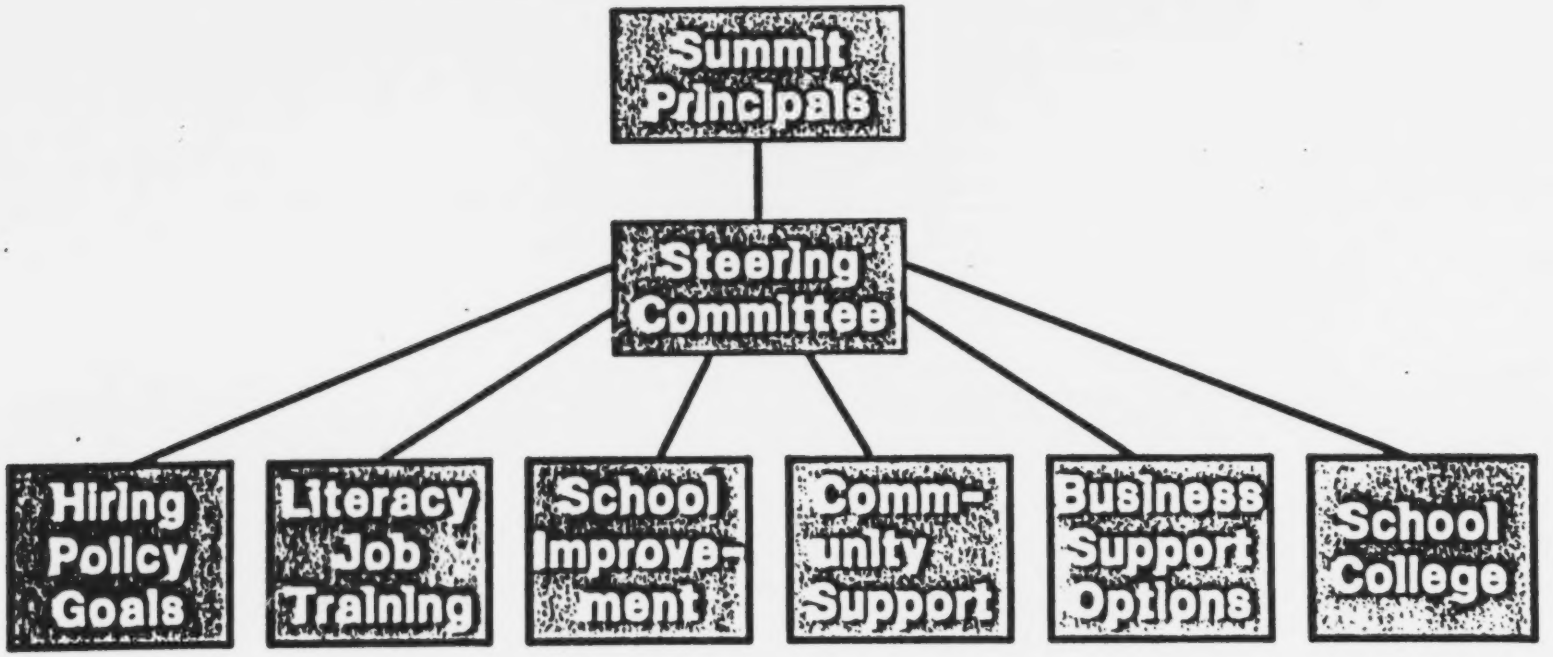
E. Community Support Options Work Group

Shared Decision Making and Passport to Excellence: A Two-Pronged Approach

This proposal attempts to strengthen parent participation in the local schools while linking "at risk" children and their parents in out of school educational/community activities. Specific aspects encourage parent/child involvement, school/parent partnerships, provides accountability and incentives for student in school attendance and out of school activities. Designs a role for volunteers as well as for schools to link with community based educational and social service programs.

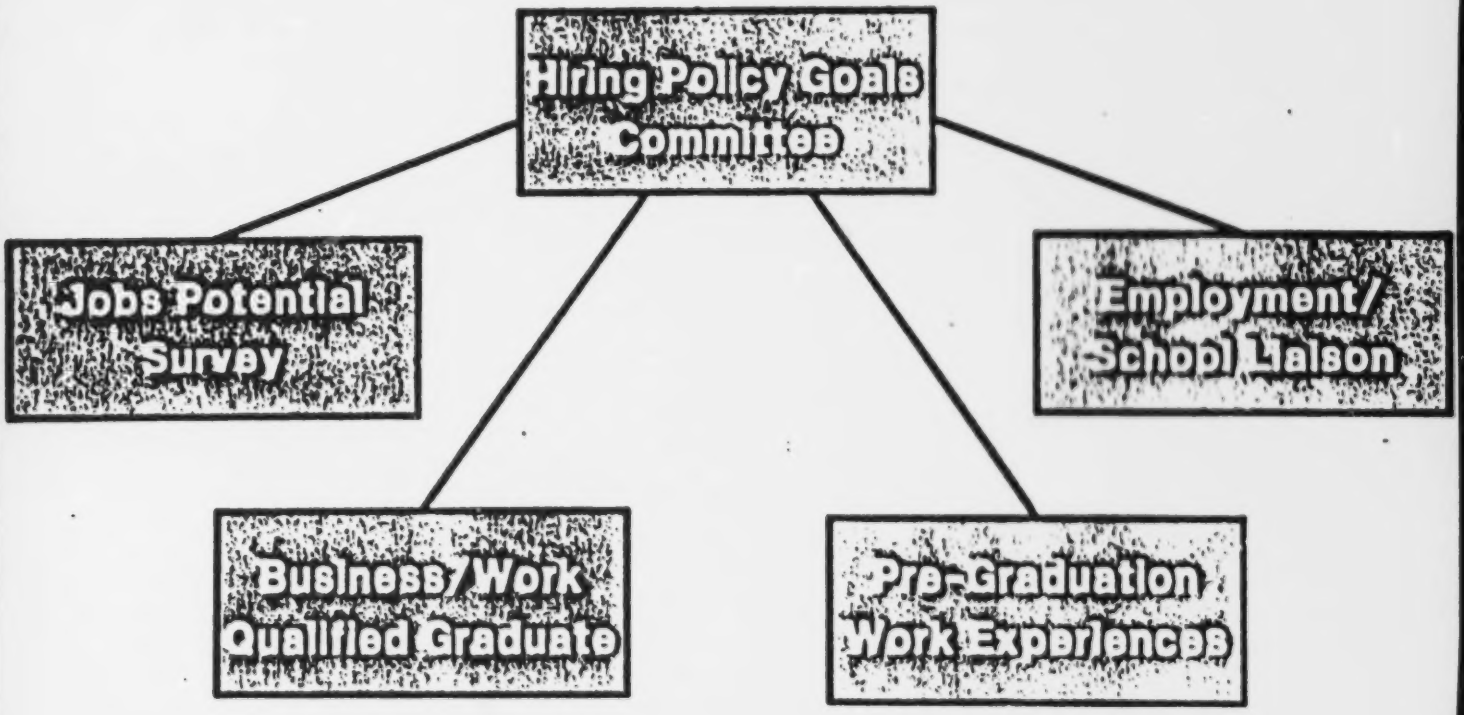

Mayor's Summit on Education (Principals)
Chicago Partnership
Steering Committee
Hiring Policy Goals
Literacy Job Training
School Improve-ment
Community Support
Business Support
School College
Chicago Public Schools
Chicago Partnership for Educational Progress

150 Business, Government, & Civic Representatives



Source: Chicago Education Summit, Hiring Policy Goals Committee January, 1987

Hiring Policy Goals Committee



Source: Chicago Education Summit, Hiring Policy Goals Committee January, 1987

Strike, learning goals stall school-biz pact

By BARBARA MARSH

Mayor Harold Washington's attempt to launch a Chicago version of the Boston Compact probably won't fly this school year.

The program here, key to the mayor's bid to build business and community momentum to improve the Chicago public schools, has lost its drive.

Modeled after a program in the Boston public schools, the Chicago plan was to start this fall as a hiring program for freshmen and sophomores in the city's public high schools.

Boston's 5-year-old program works because school officials pledged to cut dropout rates and boost attendance and achievement scores in exchange for priority hiring of graduates by local businesses.

However, Chicago's business and school leaders failed to hammer out a similar arrangement in time for this school year. Now, efforts to end the teachers strike have preoccupied education officials, postponing further progress on the compact.

Most likely, the compact won't be implemented until the next school year—if at all.

Says a businessman on the mayor's handpicked negotiating team: "We (business representatives) have spoken about going to the mayor and saying this partnership does not work and he'll have to deal with it."

The business team, headed by Carson Pirie Scott & Co. Chairman Peter Willmott, met with frustration in attempts to win a commitment from Chicago Schools Superintendent Manford Byrd to meet national standards for student achievement in math and reading, attendance rates and dropout rates over five years.

Mr. Byrd pegs the national dropout rate at around 29%—and Chicago's at roughly 44%—although outsiders suspect Chicago's rate might actually be higher.

He contends it's unfair to expect Chicago's predominantly poor school children to meet national achievement norms so quickly without major increases in staffing and programs. He estimates that such increases, plus efforts to cut the dropout rate, could require additional funding of $50 million to $100 million a year.

"Meeting national norms is a goal I'd like to work toward, because it would be great if our kids could be there," he says. But he emphasizes that studies show that poor children generally underperform other students on standardized tests.

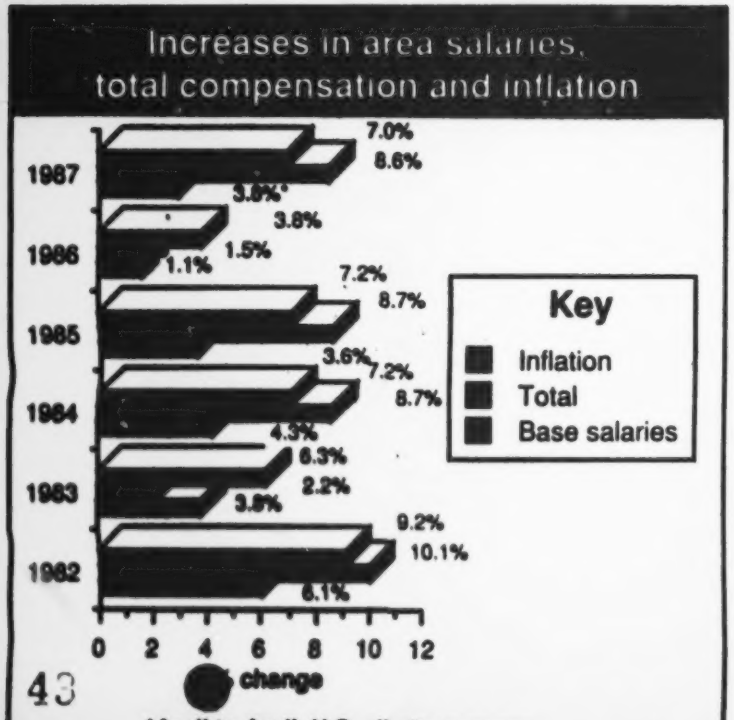
He contends that achieving national norms would require the level of staffing and curriculum development recommended six years ago in a school reform study sponsored by Chicago United, the organization of majority and minority business leaders. Chicago United estimated that implementing those changes would cost somewhere between $14.2 million and $47.5 million annually.

Ironically, in a recent report, Chicago United criticized the schools for failing to implement its most important 1981 recommendations, including the need to decentralize administration, increase autonomy for principals and encourage parental input at the local level.

"The centralization of . . . decision-making results in economic waste, alienation of the community, the high dropout rates and poor scores for which the Chicago public schools are well known," the report says.

Sources say Mr. Willmott's group balked at school demands to support more funding, insisting the schools should find creative ways to reallocate resources in the $1.8-billion system. "Any

See Schools on Page 64



Exec salaries jump 7%, best gain in five years

By PETER D. WALDSTEIN

Having cut the blubber out of their companies in years past, local executives are receiving fatter pay hikes this year.

Base salaries for top managers are rising an average 7.0% this year, compared with only 3.8% last year, according to the results of the annual Chicagoland Management Compensation Survey. Total compensation, including cash bonuses, is rising 8.6%, compared with a slim 1.5% hike in 1986.

Inflation this year is running close to 4%, compared with last year's 1.1% rate.

The compensation survey was conducted by Manplan Consultants of Lake Forest and Davidson Industry, Greater O'Hare Assn. of Commerce and Northern Illinois Industrial Assn.

This year's 7.0% hike in base salaries marks a return to gains posted in 1983 through 1985. Last year's paltry 3.8% increase was the lowest hike in base salaries since the oil-crisis year of 1973.

Donald Polatty, a Manplan partner, attributes this year's larger wage hikes to the results of recent efforts to trim job rolls by the 52 companies—18 public, 34 private—that responded to the survey.

Fifty-five percent of the participating firms reported decreases or no change in their employee levels this year. Even among the 45% of firms reporting more

Meanwhile, 70% of the firms this year are reporting sales increases averaging 9.6%. On the whole, that means companies are getting more bang for their buck from fewer employees.

"The shift is toward performance-based compensation," says Mr. Polatty. "Executives don't expect to get wage increases if their companies don't perform well."

Not surprisingly, chief executives are reaping the highest salary gains among the 12 top management positions surveyed. The CEO's base salary is increasing an average 14.8% this year, followed by the chief operating officer at 13.1% and divisional chief executives at 11.3%. Top financial account-

Smoke-filled lunchrooms are a drag!

SMOKERS VERSUS NON-SMOKERS

Air quality within the office and lunch areas has become an important issue. In particular is the growing concern over the health effects of second-hand cigarette smoke. Removal of annoying cigarette smoke is now made possible with the BeckAir clean air system. Rid the air in your workplace of smoke, dust, odors, even pollen quickly and quietly with the economical BeckAir system.

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Rodman . . .

Continued from Page 63

Mama Tish's shareholders that easily could have topped the $1.5-million cost of the buyback.

As troubling as the Mama Tish's deal is the performance of other Rodman deals since January 1986.

It was then that Rodman began the task of selling another private placement for an upstart commuter air carrier headed by former Midway Airlines Inc. President Neal Meehan.

The Chicago brokerage handled the $6.8-million financing for Chicago Airlines Inc., which in May 1986 inaugurated service from Midway Airport. In a financial shambles after six months, the firm was sold to Stevens Point, Wis.-based Midstate Airlines.

Chicago Airlines, the corporate shell left behind, is now in bankruptcy and investors probably have been wiped out.

Rodman contends the investment was based on a sound business plan that went awry when Mr. Meehan leased aircraft that were far larger than needed. By the time Rodman learned of the problems, it was too late to salvage the investment, Mr. Kaufman says.

Disappointing venture

Another disappointing venture was the May 1986 Rodman public stock offering for Modular Technology Inc., a Chicago manufacturer of prefabricated office structures. It was Rodman's first initial public offering, in a deal co-managed with Blunt Ellis & Loewi Inc. The stock, offered at $7.25 a share, peaked at $8.75 in 1986 and has since taken a nosedive to $3.38. Modular Technology has suffered from declining profitability, and recently underwent a management shakeup.

Even in its own investments, Rodman has had some losers. A case in point: Deerfield-based HealthMate Inc., which makes hand-held, portable X-ray machines. A year ago, Rodman purchased a 7.2% stake in the firm for $1 million. Shares at the time were trading at $1.50, but have since declined to 50 cents.

While HealthMate's product seems promising, the company lacks the cash to market the concept, and Rodman has no plans for another infusion of capital.

'Bad timing'

"It's possibly been a case of bad timing," Mr. Kaufman says of the string of troubled deals. "But I sincerely think a couple of these will work out."

And Mr. Kaufman says Rodman had far greater success with a recent investment in Needham & Co., a New York investment house that specializes in high-tech issues. Rodman is among its largest shareholders, but declined to elaborate on the performance of the investment in Needham, which is privately held.

In the meantime, Rodman appears to be shying away from other highly speculative investments. Instead, Mr. Lang's staff of six is concentrating on building its mezzanine financing business, which usually involve deals in the range of $5 million to $50 million.

Recent deals include $55 million in financing for Phoenix-based Yellow Front Stores and an $8-million placement for Allentown, Pa.-based Fuller Co. Fuller is a former subsidiary of GATX Corp., a manufacturer of concrete-making equipment.

"If we saw another Chicago Air, we would check it out," Mr. Lang says. "But our staff is geared toward different things."#

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Continued from Page 3

corporate executive can find 10% to 15% in cost-cutting right under his or her nose," says one insider on the negotiations.

Mr. Willmott refused to comment, saying the negotiations are "too delicate at this point."

His key private-sector compatriots include Frank Luerssen, chairman of Inland Steel Industries Inc.; David Vitale, executive vice-president at First National Bank; Richard Sandor, senior vice-president of Drexel Burnham Lambert Inc.; Leon Jackson, president of Multi-Fac Corp., and Mario Aranda, president of Aranda & Bechily.

What's more, even though the mayor's campaign targeted educational improvements as a top priority for his second term, critics in the business community don't believe adequate attention is being paid to the issue.

"I don't think the mayor's office has put enough pressure on the schools," says one source in Mr. Willmott's camp. "Anybody who thinks we'll get an agreement without pressure is naive, and the pressure hasn't been there yet."

Insists Hal Barron, Mayor Washington's chief education aide: "We're making progress. I wish it were going quicker, but these are very complex things. My driving purpose is to expedite this and make sure (it doesn't fall apart)."#

An important reminder for company heads

QB Club to feature Fencik and Harbaugh

As the Chicago Bears gear up for Detroit, Crain's Quarterback Club welcomes Gary Fencik and 1987 No. 1 draft choice Jim Harbaugh to Tuesday's sellout luncheon. Also at this week's event, Apple Computer Inc. will sponsor a drawing for a free Macintosh Plus Computer.

Every Tuesday during the football season, Crain's Quarterback Club features Bears players and sports celebrities who discuss the season, the most recent game and the current controversies.

School plan calls for local control

By Casey Banas
Education writer

Frustrated at the stalemate in negotiations with city public school officials over a "learn-earn" agreement, a Chicago business group has drafted a reform plan that would give local school committees the power to set their budgets and hire and fire staff.

The proposal—developed by the staff of Chicago United, a coalition of 78 top businesses and civic groups—comes after a breakdown in private talks this summer between school officials and the city's business community on a joint effort intended to improve public schools.

The business community, operating under the banner of Chicago Partnership for Educational Progress, and top school officials had tried to reach agreement on a proposal under which Chicago businesses would pledge a specific number of jobs for public school graduates in exchange for commitments from school officials to improve the quality of education.

The so-called "learn-earn" compact was the first goal of an "educational summit" of business and school leaders convened last year by Mayor Harold Washington.

Business had proposed making a commitment of 5,000 jobs by 1992, in return for specific achievement goals—that the school system improve overall student performance to at least national norms in reading and math in five years and reduce the dropout level to the national average in 10 years.

The partnership also proposed that the board and the city pay for an annual outside audit of performance in Chicago public schools, according

See Reform, pg. 16

● Fix schools now, parents say. Sec. 2, pg. 3.
● A bleak employment picture. Sec. 2, pg. 3.

From Page 1

Reform

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to internal partnership documents obtained by The Tribune.

School officials accepted the audit but wanted a commitment to provide 6,000 jobs for 1988 high school graduates and help seek $100 million in additional tax revenues. In return, the schools would accept setting a public goal that the average student would reach national norms on achievement tests, but they wanted the jobs for graduates even if the achievement goal was not met.

Business representatives were appalled at the counterproposal, according to the documents.

The partnership's response was that "with an $1.8 billion budget, the school system can be accountable for improved student results" and that "existing resources should be reallocated and used more effectively," according to the documents.

"We are not denying the need for additional money," said Patrick J. Keleher Jr., Chicago United's director of public policy and author of the organization's draft plan. "We want stewardship of the current money, not superficial reform."

Keleher, who also was on the support staff for the partnership, said the business group has put negotiations over "learn-earn" on "the back burner" and shifted to the new strategy. With the school reform movement growing, business wants to present its own plan, he said.

"In reviewing the negotiations on 'learn-earn,' we realize that for this to be successful, first we must take advantage of the window of opportunity next spring with the state legislature," Keleher said.

He said the unprecedented public cry for school reform probably will last only through the next session of the General Assembly, making this the time to press for substantive change in city public schools.

Other possible reform plans are being developed by an ad hoc council of 50 parents and community members appointed by the mayor, the school board itself and the Chicago Teachers Union.

Eventually, Keleher said, all four plans will be presented to the mayor's "educational summit," which will seek to develop a consensus. The summit membership includes 39 business, education, civic and community leaders, and it will be expanded to include 5 to 10 parents of Chicago public school children.

Keleher said Washington's role in presenting one school reform package to state lawmakers is crucial.

"The only one to send a message to the General Assembly is the mayor," he said. "The credibility of the school board is so strained that only the mayor will be believed."

Under Chicago United's plan, all 594 city public schools would be governed by individual local school improvement councils that include principals, teachers, parents and citizens.

It is the most extensive proposal yet to emphasize community control of schools and accountability by the school superintendent and principals to the public in the reform movement now gathering steam across the city.

The councils would receive an allotment of money for each student from a central school administration and have full authority to decide how the money is used. They also would have the power to hire and fire the principals, all teachers and all other staff members. It also would be able to develop a curriculum geared to local needs.

Every board member and the superintendent of schools would need to enter into "a performance contract" specifying her or his commitment to reaching national norms in achievement for students, to reducing the central bureaucracy and to giving the sweeping new powers to local school improvement councils.

Also, principals would have to enter into a performance contract specifying her or his commitment to educational goals set by the local school improvement council.

Keleher said one of the biggest criticisms of the proposal would be that effective local leadership could not be developed in all the schools.

"We think the leadership could be found there," he said.

Local community organizations such as the United Neighborhood Organizations could help identify potentially effective local school leaders, and training programs could be mounted to prepare them for their roles, he contended.

Keleher said this plan should be in full operation in three to five years, including a one-year planning period. Though giving effective local control to 594 individual school councils would be the most radical change in the history of Chicago public schools, he said top businessmen consider major changes "an inviting challenge."

The proposal has other components, such as improving the skills of principals and teachers.

The plan tentatively also calls for discussion of a controversial voucher system. The voucher proposal, discussed in many educational circles for the last 20 years, would give every student a voucher—or an allotment of funds for one year of an education—and permit the youngster to enroll in any school.

The Chicago United draft proposal will be presented to eight groups representing 4,500 Chicago businesses for their endorsement. In addition to Chicago United, the plan will be presented to the Chicago Association of Commerce and Industry, Chicago Association of Neighborhood Development Organizations, Chicago Central Area Committee, Commercial Club's Civic Committee, Civic Federation, Education Development Commission and Metropolitan Planning Council.

CHICAGO TRIBUNE
November 10, 1987

What happened to Class of '85?

Study: 1 of 3 public high school graduates are jobless

By Casey Banas
Education writer

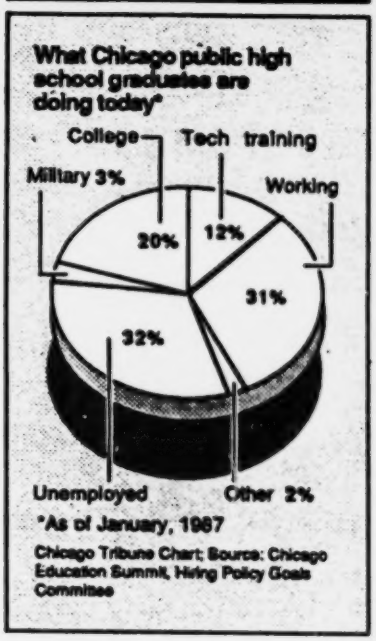
One of every three students who graduated from Chicago public high schools in 1985 was unemployed last year, according to a new study done by a school-reform committee.

The survey was done by the Hiring Policy Goals Committee, one of the subgroups set up by Mayor Harold Washington's educational summit last year in an attempt to forge a new partnership between the city's business community and Chicago's public school system. The Hiring Policy Goals Committee, led by Gene Cartwright, manager of community affairs at Amoco Corp., wanted some indication of the extent of the job problem with graduates of public high schools.

Using statistics from the Mayor's Office of Employment and Training, the committee developed a picture of what happened to the 1985 graduates.

"While these numbers of very soft, they do provide a general picture of the extent of the problem," the committee said. "The school system has a difficult time keeping track of its graduates—because so many leave the city or change their plans."

1985 graduates



According to the study, of the 16,000 graduates:

- 20 percent, or 3,200, were enrolled in four-year colleges or universities in 1986.
- 12 percent, or 1,900, went to two-year colleges or technical training schools.
- 32 percent, or 5,100, were unemployed.
- 31 percent, or 5,000, were employed. But the committee said it suspected that "most of them are dead-end jobs."
- 3 percent, or 500, were in the military.
- 2 percent, or 300, were not in the labor force for unspecified miscellaneous reasons.

Patrick J. Keleher Jr., director of public policy for Chicago United, a coalition of 78 top business firms and civic organizations, said the figures "may be off 2 or 3 percent either way."

But, Keleher said: "We're cheating students with a high school diploma that is so devalued. It conveys to them a sense of hope and opportunity. But only one-third of the students who get the diploma could read at a 12th-grade level."

OPINION

Education reform may be too late

Some key leaders in Chicago's business community and Mayor Washington appear determined to make a diploma from the Chicago public school system mean something. If the mayor and Carson Pirie Scott & Co. Chairman Peter Willmott achieve what they envision (*CCB*, June 15), a diploma will mean that the graduate who earns one from the Chicago public schools can read, write and factor at a level proficient enough to make him or her worth hiring; and a diploma also will mean that Chicago business stands ready to hire those same graduates.

While the Learn-Earn Partnership faces enormous obstacles, it's important to recognize that the ad hoc committee developing it is proceeding with a clearly defined strategy for phased-in implementation and realistic achievement goals.

On the other hand, the partnership is the kind of desperate program one would expect to emerge in the non-competitive environment for education with which Chicago finds itself saddled. Burdened with a 50% effective drop-out rate and suspect achievement levels for those who stay in school, the Chicago public schools are a shambles. And unless the school system can somehow reform itself quickly, it's possible the whole system could go into a court-ordered receivership.

The Learn-Earn Partnership is an attempt to co-opt the opposition by introducing a tiny element of private direction to the public sector. The fact that businesses—major users of the Chicago public schools' product—may force some quality standards on the system is as encouraging as it is long overdue.

Nevertheless, the partnership fails to address the fundamental problem in public education: lack of accountability by teachers and principals to students, parents and employers. The partnership will encompass only 5,000 students a year if it reaches its goal in five years. That would leave 425,298 students to flounder in the morass of Chicago public education.

If successful, the partnership may be expanded, and it may indeed save the public schools. For the sake of the students still laboring under the current system and the employers who hire them, we hope the partnership works. As we've expressed it before, we're ready to try something more radical: privatization of public education #

TRIBUNE 5/29/87

Mayor's plan: Link jobs to diplomas

By James Strong

Mayor Harold Washington announced Thursday the first steps in a long-range plan to break the Chicago school system's "cycle of failure" by linking new learning programs with job opportunities in the city's business community.

The latest plan to give Chicago high school students incentive will be an effort by public and private industry leaders to draft a program giving graduates guaranteed jobs, Washington said.

While Frank Gardner, the new board of education president, and Manford Byrd Jr., school superintendent, looked on, Washington censured the school system: "Too few Chicago teenagers are graduating from high school with acceptable reading, writing and math skills."

He said the business, civic and education leaders have "committed themselves to solutions that would break those cycles of failure for our children."

The primary objectives of the new "Chicago Partnership" will be to set goals and timetables for improvements in the school system and for hiring youths who graduate from it. The program will be directed by Peter Willmott, chairman and chief executive officer of Carson Pirie Scott & Co.

Washington said it is imperative that the city support a recommitment to quality education.

About 140 volunteers from the public and private sector have discussed preliminary guidelines for the program and will begin "negotiations" on a program of education and job guarantees June 8.

Washington said he hopes that a new learning and jobs program can be in place when the new school year begins.

In supporting the concept, Willmott said at a City Hall news conference, "We are ready to offer jobs to those who have benefited from a good educational system and, therefore, are prepared for the rigors of a competitive business environment."

The new group is a result of recommendations in the "The Chicago Project, A Report on Civic Life in Chicago" published last September by a special committee studying the city's future.

Jose Lemus, Grade 2

Kelsie Saddler, Grade 2

Business and the schools crisis

Worried firms boost aid nationwide, with mixed results

By BARBARA MARSH

Nobody is employed in Maria Marquez's family.

Her mother is divorced and on welfare, which supports five children living at home. The family moved to Chicago's Pilsen community from Mexico eight years ago, but Maria's father remains in Mexico, and the family never hears from him. Her older brother dropped out of high school to take a job, but he quit soon after.

Maria, a petite, sparkling-eyed 18-year-old, won't take after her brother if she can help it. Through a business-community experiment in drop-out prevention at Farragut Career Academy, the local public high school where Maria is a junior, she's learning what it takes to make it in the job world.

So far, the results of the experiment, dubbed Job Readiness by the officials and "JR" by the kids, look good. Most important, the 344 economically disadvantaged minority participants at Farragut get summer jobs if they keep up their grades and attendance.

After benefiting from two summer jobs she got through JR, Maria finds the business world to her liking, and she dreams of landing a college scholarship. "When I see all the secretaries and clerks and businessmen, that makes me want to sit in one of their chairs," she says, bobbing her head in emphasis.

Farragut's JR students—now in the third of a four-year experiment—seem to be making headway. According to a survey last year, the attendance rate for 10th graders who'd been in the program two years was 91%, compared with 79% for a group of non JR classmates. Only 7% of the JR students had dropped out, that contrasts with 32% for the comparison group.

Also contributing to this article were: Loretta Ashyk of *Crain's Cleveland Business*, Mark Litt of *Crain's New York Business* and Vanessa Viste of *Crain's Detroit Business*.

JR works through a series of carrot-and-stick techniques aimed at instilling in students the discipline to finish high school and hold a job. JR students take career-oriented classes on top of the usual academic load. A slightly smaller-than-average class size (25 for JR classes, 27 for the others) provides more individual attention.

Teachers, drumming in good work habits, closely monitor attendance. They scold latecomers, encourage students to report on their friends if they cut class and publicly chide unprepared students with embarrassing questions.

The $150,000-a-year grant that funds much of the JR budget at both Farragut and Chicago's Dunbar High School actually comes from outside the community—from the Edna McConnell Clark Foundation in New York—and the start-up funding will disappear after next year.

Thus far, Chicago United, the local business organization that administers the JR program, has no intention of picking up the tab. And the Chicago Board of Education may have other issues to contend with.

Still, there's a chance that creative business initiatives such as JR won't keep falling through the cracks. Spurred by the public schools' dreary record, Chicago corporate leaders seem dedicated to deepening business involvement in efforts to help improve public education.

Indeed, businesses in many U.S. cities—both individually and through associations—are creating programs to address some of the worst problems of their school systems. The newfound concern stems almost exclusively from economic considerations—among them, looming shortages of younger workers, burgeoning costs of re-education and social costs associated with illiteracy and poverty.

Diversity of approach is one of only two characteristics common to these various programs, which grow out of situations specific to the individual cities and their business communities.

The other common characteristic

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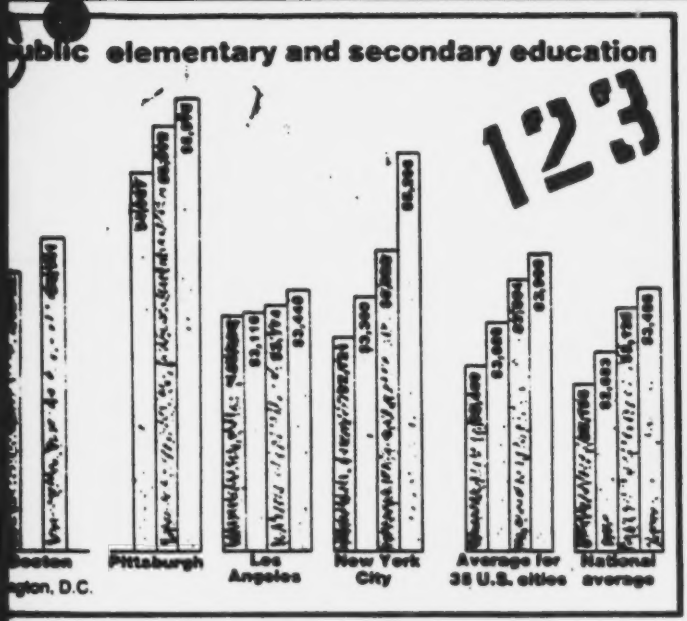

Photo by Roger Mastroianni

Cleveland's Joan Lamson must pay for the schools' failure by providing basic skills training for new employees. The costs are frightening.

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appears to be a consensus that public education simply can't be permitted to degenerate further.

"If I, as a citizen, could flip one switch and solve a problem, it would be education in the city of Chicago," says Harris Bank CEO B. Kenneth West, who serves on Mayor Harold Washington's recently created Education Summit, an effort aimed at launching a sweeping jobs-for-students alliance in the fall.

Major effort

If it gets off the ground, the Chicago effort would involve hundreds of local companies providing jobs for students (possibly including those at private schools) who stay in school and keep their grades and attendance up.

The program would be loosely modeled on a successful effort in Boston, dubbed the Boston Compact (*CCB*, Sept. 29, 1986). However, it's doubtful that Chicago companies will make an iron-clad Boston-style promise to provide every qualifying student a job. While Boston's unemployment rate, as of December, was 2.6%, Chicago's was 6.3%.

Worse, a task force report pegged the local unemployment rate at about 30% for the 16,000 students who graduated from the Chicago public schools in 1985.

"Of that 30% plus the dropouts, we're talking about a potential of up to 12,000 students a year," says Gene Cartwright, Amoco Corp.'s community affairs manager, who heads the Education Summit's key business committee. "I don't know yet whether we can produce 10,000 or so jobs a year."

Mr. Cartwright's committee is trying to determine precisely what skills employers require of entry-level workers. Having isolated 20 categories of entry-level jobs expected to experience growth, the task force now is surveying 285 local businesses that offer these growth jobs.

With cooperation of teachers and administrators, the task force also hopes to recommend ways that the public schools can redirect their programs to prepare youngsters for those jobs.

Still, Chicago's evolving business-public school alliance can't yet claim the sweeping success of citywide partnerships in Boston and Pittsburgh, and chances are remote that the success of a statewide partnership in Florida can be duplicated here.

The sea-saw change in business-school relationships that started in the early 1980s in smaller cities only recently has spread to major cities.

Such sudden enthusiasm for education reform isn't merely altruistic. The cost of non-involvement is a major impetus behind business efforts.

In the short run, small businesses stand to gain the most from efforts to help public schools. Their salary scales usually are lower than those of larger companies, so they can't be as choosy among entry-level candidates. But, according to Robert Martin, an education lobbyist at the U. S. Chamber of Commerce, they provide the first job for at least 80% of students coming out of school.

Many small business owners across the country are disgusted with the poor quality of entry-level applicants coming out of the public schools. But few have the wherewithal to do much about the situation.

Nevertheless, some, such as Joan Lamson of Castite Systems Inc., a Cleveland firm that seals metal castings, find themselves paying for the schools' failure by providing basic-skills training for new employees.

Ms. Lamson is fed up with high-school applicants who, she says, lack "even the slightest glimmer of problem-solving skills." So, she's considering hiring someone to tutor employees in math and reading.

Costs staggering

But the costs are frightening. She's already shelling out $75 for a consulting firm's assessment of the basic skills of each entry-level hire. This year, she estimates she'll pay out $1,000 to shore up basic skills.

Likewise, large corporations grumble about the rising tab for basic-skills training. In 1977, more than a third of the 610 corporations surveyed by the Conference Board—a national business-policy organization—indicated they were offering some sort of basic-skills training. Experts say the figure has risen since. However, no one can pinpoint how much of the estimated $40 billion that companies spend on formal training goes for basic skills.

Large corporations also suffer when a poor urban school system poisons the image of their city, hob-

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Photo by Mark Wellhausen

In Florida, businessman John Schebel reached out to the teachers union. The result: up to $350 million in new taxes on business over five years.

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bling their efforts to recruit the best and brightest managers.

"The Cleveland area can take on any metropolitan area in culture, sports and beauty, but we can't compete because of our school system," laments John Lewis, committee chairman of the Greater Cleveland Roundtable, a coalition of corporate, labor, education and community leaders.

Costs staggering

Over the long run, experts agree that the costs to society of a population of untrained, unproductive individuals could be staggering. Business, as well as individual taxpayers, will bear the brunt of those costs.

"The cost (to society) for anybody who doesn't make it is $300,000 over a lifetime," estimates Irving Harris, a Chicago businessman and philanthropist who's a leading supporter of early childhood education. "The cost in human terms is so much more."

At the same time, demographers predict a nationwide shortage of young workers by the year 2000. Reports William Johnston, a senior researcher at the Indianapolis-based Hudson Institute, "With the absolute numbers of new workers age 16 to 34 declining by almost 5 million, many companies may find themselves unable to move rapidly to hire large numbers of new workers to respond to changing economic conditions."

Companies in the Midwest and the Northeast—already afflicted by outmigration during the past decade—will feel the pinch most severely. Mr. Johnston adds that the practice of laying off older workers in declining industries while hiring younger workers in growth fields will become more difficult. Early retirements will be much more expensive, and young workers could demand significantly higher wages.

Clouding the already bleak future of public education will be the surging population of minorities: By the year 2000, one of every three Americans will be non-white. "A larger percentage of our workforce will be poor minority students—kids we've had the least success in educating in the first place," says Michael Timpane, president of Columbia University's Teachers College in New York.

Racial breakdown

Already, 60% of the pupils enrolled in the Chicago public schools are black, 22% Hispanic and the rest—except for a fraction representing other minorities—are white.

Still, business generally remains reluctant to commit philanthropic support to urban public schools. A 1984 survey of 411 major corporations nationwide indicated that they annually gave a total of $26 million to support both private and public elementary and secondary schools—or only 5.2% of their total contributions to education.

Executives at city-based corporations who send their children to private or suburban schools often have limited understanding of urban school problems.

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Unaware of implications

For instance, in Cleveland, where a federal judge's 1978 desegregation order soured the business community on urban public school reform until quite recently, few business people even are well acquainted with the provisions of the judge's shattering order.

Says Jerry Jarrett, chairman of AmeriTrust Corp., Ohio's fourth-largest bank holding company, "I don't think it's any of my business to read the order. I don't live in Cleveland. I'm not a voter in the city and I don't vote for the school board." Ironically, he heads Cleveland's Center for Corporate Involvement, a program that loaned local executives to the schools to help with management problems.

Meanwhile, the waves of educational-improvement programs that come and go make teachers cynical. When James Foley, auto shop instructor at Chicago's Farragut High School, was invited to join the JR teaching team, he figured, "Sure, why not? A lot of these programs don't even get started. There was a 'Project Read.' There was a 'You Can' program—I'm sure the person (who headed that program) still exists in the administration somewhere."

Indeed, there's little satisfaction in piecemeal assistance on either side. In Detroit, where 50 companies are involved in Adopt-A-School and other school partnerships, Lawrence Givens, a spokesman for the Automobile Club of Michigan, insists such involvement isn't enough, noting that 90% of the Detroit schools remain orphans.

"The notion of adopting schools has been around a long time but has never caught on in a large way." Business frequently doesn't know how to help, he says, and schools, once adopted, often can't pinpoint how.

Even public proponents of Adopt-A-School programs privately admit that they vary widely in effectiveness. Most programs are just window dressing, although every city has its shining exceptions.

"Adopt-A-School was an easy way for business to become involved, by helping buy team uniforms or setting up a science fair or providing summer interns. It usually works fine in middle-class schools," says Sandra Hamburg, a spokeswoman for the New York-based Committee for Economic Development, a national organization of corporate executives that promotes business-school partnerships.

"It's much more difficult to make substantive improvements in inner-city schools."

And the few successes tend to get lost in the shuffle. "There are wonderful things happening, but too often, the successes don't get replicated or the failures corrected," says Robert Wagner Jr., president of the New York City Board of Education. "And that's so often true of business efforts."

Numerous possibilities

The finest business-school alliances may embrace an entire system, as in Boston, Pittsburgh and Florida. Or, as the JR program has demonstrated here, business spearheads innovative approaches to a problem as complicated as educating disadvantaged low-achievers. Or, by Irving Harris' example in Chicago, business can even promote new ways of attacking the cycle of poverty—a complex of social problems that dooms some kids even before they start school.

Still, business-public school partnerships that work have a couple of things in common.

They apply to the schools methods that business people already use with success in their own operations—such as lobbying state and federal legislators, offering performance incentives to their people or sniffing out innovation. And they have the momentum that only derives from the passionate

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commitment of individual leaders.

Increasingly—and incredibly—business isn't waiting for state legislators to sock them for additional tax revenues for education. In fact, in Florida right now, business leaders are buttonholing their state lawmakers, asking to be taxed more in exchange for educational reforms.

Strange bedfellows

The politics of education in Florida has made for strange bedfellows: the most anti-union statewide business organization and its largest teachers union.

What triggered a meeting of the minds was the failure of former Gov. Bob Graham's merit-pay plan for Florida teachers, which business backed and the teachers opposed. Though passed by the State Legislature in 1984, the plan fell apart.

At that point, Jon Schebel, president of Associated Industries of Florida, the anti-union business group, phoned Pat Tornillo, president of the teachers union, to say, "This is never going to work as long as we're fighting each other."

That led to frank talk about Florida's extremely critical teacher shortage: The state, which boasts a low unemployment rate of 5.8%, is growing so fast that it must recruit two out of three of its teachers from out of state.

Mr. Schebel considered the link between educational quality and Florida's ability to attract top teachers key to its competitiveness in world markets. "We now live in a global economy. We don't just compete with Boston, Chicago and New York, but also Hong Kong, Japan, Korea, every place in the world," he says.

"There must be financial compensation to attract the best people. People don't go into education to become millionaires, but they want to make a decent living, send their own children to college and live in the middle-class or upper-middle-class."

Other groups joined the discussions, including Florida's Council of 100—composed of chief executives from the state's large corporations—the state Chamber of Commerce and a variety of professional educators associations. The resulting group, the Business and Education Coalition, met for a year, holding retreats and listening to experts.

Eventually, the coalition drew up plans for improving the compensation structure for teachers and for a career ladder to replace the merit-pay plan. With business people lobbying alongside educators, the plan won legislative approval in Tallahassee last year.

This month, businesses are asking the State Legislature to fund the plan by repealing certain sales tax exemptions. Businesses expect to pay $90 million this year to launch the program and up to $350 million a year in five years.

'Corporate responsibility'

"We're saying, 'Tax us, and this is how we'd like to be taxed,' " says Mr. Schebel. "We think it's a corporate responsibility to come forth with a plan."

Meanwhile, Chicago's maverick philanthropist, Mr. Harris, chairman of Pittway Corp.'s executive committee, is overturning the conventional notion that education begins in kindergarten—or even preschool.

He's tracing the causes of educational failure among disadvantaged students back to the cradle. "It's almost immoral," he insists, "to have it determined before a child is 3 years old that he won't make it in school, that in 12 years he'll be selling drugs and find himself in prison at 16 or 18."

He challenges policymakers who hold the educational purse strings to rethink their funding priorities, contending that the U.S. educational system assumes—wrongly—that children come to kindergarten prepared. In total, $261 billion a year is spent nationally for kindergarten

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EDUCATION

Staff photo by Mary Horisky

With Project Beethoven, Chicago philanthropist Irving Harris is tracing the causes of educational failure back to the cradle.

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through graduate school, both public and private; only $1 billion goes for kids age 5 and under, and that all winds up in Head Start.

Continuing search

Mr. Harris, a long-time proponent of Head Start, is now looking for answers for students that Head Start doesn't reach. According to a well-known study of about 100 Ypsilanti, Mich., children in Head Start, 67% of the students eventually finished high school—compared with 49% for similar students not in the program.

"But, still," says Mr. Harris, "33% of the Head Start kids didn't."

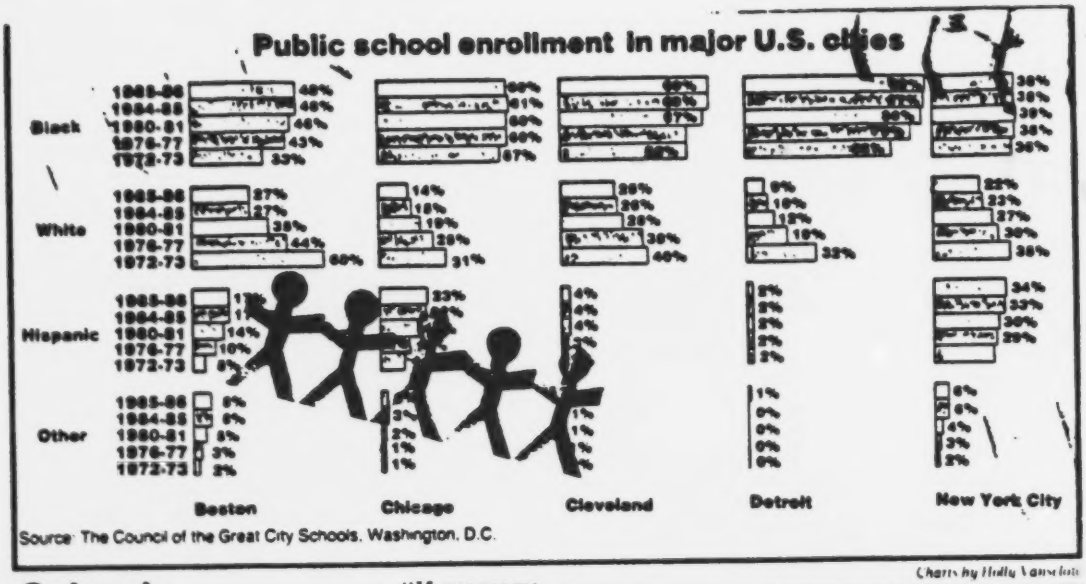
To show how such children can be helped, Mr. Harris—who's already contributed $20 million to other philanthropic programs—has inaugurated the experimental Project Beethoven in Chicago's Robert Taylor public housing complex. The project promises a chance to succeed to all infants born in the next year, who are expected to start kindergarten at the neighborhood Beethoven Elementary School in 1991.

The project will embrace about 125 to 150 newborns this year—and groups of that size will be added next year and the following year.

Essential assistance

The babies' mothers—most of whom are unwed teen-agers—will receive prenatal care to help prevent

See **Schools** *on Page 28*



Source: The Council of the Great City Schools, Washington, D.C.

Charts by Holly Vanselow

Schools . . .

Continued from Page 27

low birth weight and the risks associated with it. They'll also learn nurturing skills and how to provide good nutrition. And they'll meet with counselors who'll encourage them to stay in school and find jobs.

Mothers deputized

Former welfare mothers in the Taylor homes have been deputized to visit the mothers—and will earn $9,500 a year for their efforts. Overall, Mr. Harris has comitted $600,000 for the next three years, matching a $600,000 grant from the U.S. Department of Health and Human Services.

Although results of this program won't be available for years, Mr. Harris expects it to be replicated in several other Illinois locations this year. "It's so important to try—not that we know precisely that we'll be successful—but the need is so great," he says.

Sponsors of even the tried-and-true business initiatives insist there is no quick fix to the problems of urban public schools. "There isn't any magic wand you can wave and get an answer," says Owen Butler, retired chairman of Cincinnati-based Procter & Gamble Co. and an outspoken advocate of business-school partnerships.

Nowhere is that more apparent than in Chicago United's JR program. Despite its success, the future looks gloomy because of its funding crunch. Chicago Public Schools Superintendent Manford Byrd says he's personally impressed with JR. But its financial problems remind him of how, several years ago, he had to cut positions in several schools that were created by another Chicago United initiative—Career Development Centers. (He later restored those jobs.)

"If programs start out with outside funds, it does not mean that the school system necessarily can wind up paying those dollars when private funds dry up," he says. "We (the Board of Education) are $57 million in the hole as we look toward next year."

And even if new funding is found, the program could stand some rethinking before it's expanded. The grade-point average for JR 10th-graders at Farragut last year was up only a smidgen—1.32 versus 1.14 for the comparison group.

Furthermore, JR offers only summer jobs to qualifying students, so youngsters like Maria Marquez must go out on their own to find year-round part-time employment.

And, unlike some cities' partnerships that offer jobs for disadvantaged youth, JR doesn't pair students with business-community volunteers who act as mentors in the job world.

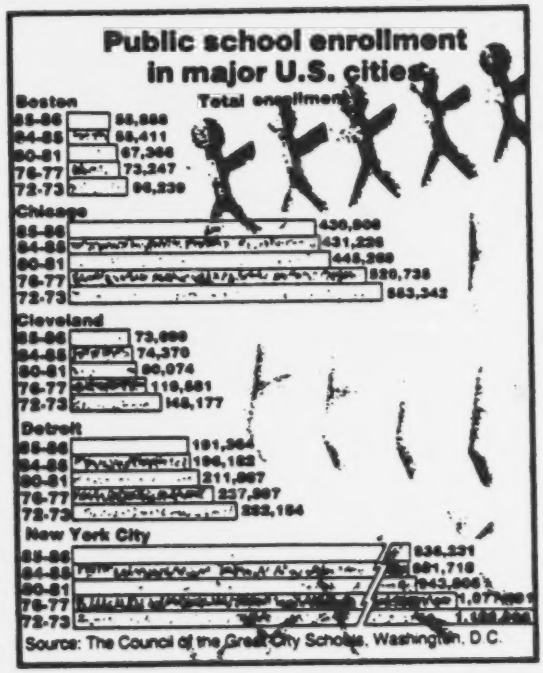
Still, local business, community and education leaders might look to the experiences of people like Gandy Heaston, the popular dynamo who runs JR at Farragut.

Ms. Heaston, a warm, pudgy, highly organized woman who calls her JR students "baby," phones parents whenever kids cut class and sends the truant officer after them when necessary. She largely is responsible for JR's tentative successes at Farragut.

Continued hope

Now, making her rounds at Chicago elementary schools, recruiting JR students for this fall, she also hopes the schools will allocate government funds to help support her $32,000-a-year salary as the Clark Foundation grant runs out.

On a recent morning, she had a JR student painting the program's logo in black and white on the wall outside her office, in hopes the project will enter, as she calls it, the "institutionalization phase." #



OPINION 3/16

Let's privatize Chicago's schools

Time is running out on public education in Chicago.

As Associate Editor Barbara Marsh documents in a special report beginning on Page 21 this week, business' dissatisfaction with public education runs deeper and wider than most people know—and certainly is more serious than public officials care to acknowledge. Her research shows a unanimity of hostility to education systems around the country, which are failing at the same rate and in the same way. Public schools today are producing a majority of students who can't master basic survival skills such as reading and writing. The public systems are failing to graduate more than half the students who enter, and they are resisting most attempts to make themselves accountable to the public.

Demands by business for educated students indicate more than just a moral conscience. The demands reflect economic imperatives to find enough minimally qualified people to handle normal business growth.

Those demands are growing more intense even as the schools lose their capability or willingness to meet them.

It's time for some radical changes in education in Chicago and other cities, and the change that promises the biggest return for the investment is one that injects competition into education. Business people, more than most citizens, should recognize the value of competition in any enterprise, but especially in education, where a huge bureaucracy of entrenched administrators and feisty unions combine to keep the schools beyond accountability.

A competitive marketplace in education—backed by a voucher system for Chicago parents—would allow new ideas and techniques to rise to the top and survive or fail on their own merits.

Opponents of change argue that such a system would destroy public education in Chicago. But surveying the depressing record of achievement racked up in Chicago, Cleveland, Detroit and New York, we can only conclude that public education has been destroying itself for decades.

The system, at least as it's practiced in Chicago, doesn't deserve to survive.#

Inside business

Chicago business' interest in education a good 1st step

By Bill Barnhart
and Sallie Gaines

The fashionable talk these days about the need for a "partnership" between Chicago's business and civic leaders sorely has lacked, shall we say, specificity.

That's why last week's reports of "negotiations" between business leaders and school officials sounded encouraging. It seemed Chicago was headed toward a Boston-style "compact" between business and education leaders promising local job opportunities for high school graduates in exchange for educational reform.

Alas, mention of negotiations and agreements here was premature. A diverse group of business, community and educational leaders organized earlier this year by Mayor **Harold Washington** is just beginning to tackle the mammoth problems of youth unemployment and educational failure. So far, there's nothing to negotiate. **Harold Baron**, an advisor to Washington on education, said he wasn't aware reporters were present when he spoke last Monday about the efforts.

Nevertheless, the objective of enrolling business in solving Chicago's educational and youth unemployment woes is significant enough to warrant continual public attention and comment.

Bottom Line

Among the corporate chieftains who have joined the mayor's program are **Richard M. Morrow**, chairman of Amoco Corp.; **B. Kenneth West**, chairman of Harris Bankcorp; **Karl D. Bays**, chairman of Baxter Travenol Laboratories Inc.; and **Ronald J. Gidwitz**, president of Helene Curtis Industries Inc.

But most of the business leaders who potentially can offer job opportunities to Chicago high school graduates don't manage big banks or Fortune 500 companies.

"Our entry-level jobs are very few because we're a corporate office," noted **Gene Cartwright**, manager of community and urban affairs at Amoco and a leading player in the talks underway. "We look to find most of the opportunities for jobs in smaller companies."

"Our entry-level personnel are college graduates," agreed **Philip C. Adams Jr.**, a partner with the accounting firm Touche Ross & Co. and another private-sector volunteer in the talks.

On the other hand, owners and managers of small and medium-size businesses generally don't have the time or the staff to spend planning such a large-scale civic project.

"The very people whom we're most concerned to make a part of these things are themselves close to the margin and can't easily spring employees loose for a commitment of time," said **Fred Hess**, executive director of the Chicago Panel on Public School Policy and Finance.

These folks also are justly distrustful of anything that emanates from City Hall or the Chicago Board of Education.

In Boston, an independent organization was established to implement that city's "learn-earn" compact between business and the schools. Doing that here could spark potentially fatal turf battles between business and the Board of Education, Chicago Teachers Union and City Hall.

Despite this and many other hurdles, we can't think of a better project to test the business-city partnership rhetoric.

Chicago Tribune

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Promising idea to cut school dropouts

Mayor Harold Washington is sparking an imaginative new idea to cut down on the size of one of Chicago's most devastating problems—the enormous number of teens who drop out of high school or graduate ill-prepared to hold a job.

The numbers are a familiar dirge. Of 30,000 freshmen who entered the city's public high schools in 1985, only 9,000 are expected to graduate four years later with average or better achievement. Another 6,500 will graduate reading two years or more below grade level. Most of the rest will drop out. And they will slam up against the fact that in Chicago, 32 percent of 16- to 24-year-olds are unemployed.

What might make a significant slash in these ominous figures is assuring teens that if they stick it out through high school and do well, they will earn themselves a job after graduation.

Such promises would have to come from Chicago employers, and it won't be easy for them to stand behind offers. The job market is changing. Many employers have left the city. Much of the foreseeable job creation will come in service industries where pay is likely to be low. The city's size and diversity make the idea more complicated to try here than in Boston, which initiated a somewhat similar plan called the Boston Compact in 1982.

But Chicago urgently needs for this idea to work. And Mayor Washington is pushing representatives from the school board, City Colleges of Chicago and business, civic and community groups to get the plan underway by March and into operation by September.

What planners envision is a package of agreements between the schools and business community, even more extensive than the Boston Compact. The schools would promise to raise the skills of their graduates and reduce the dropout and absentee rates. Businesses would provide preferential hiring for Chicago public school graduates, job counseling and other help. Colleges would facilitate admission. Everyone would benefit.

Chicago has hundreds of business leaders who care about this city and understand that its current high rates of school dropouts and unemployment will produce more poverty, more welfare costs and more social problems long into the future. For them, participating in this new plan would not be just an exercise in civic altruism. It will pay off realistically for employers by helping to assure better prospective employees. And it will improve the general business climate in the city by reducing what now seems to be intractable social and economic problems.

Mayor Washington may be jumping on this idea as a bragging point for his upcoming campaign. But if he can push business leaders and school officials into action, he deserves the campaign credit. And if it's the campaign that is setting the timetable for signing the business-school agreements, so much the better. Every dropout, every young adult unable to find a job represents a human tragedy that should be avoided if possible.

'Summit' groups sift ideas in quest to help students

Better schooling, job chances are goal of city effort

By Linda Lenz

Could Chicago's vocational high schools become incubators for business enterprises operated by graduates?

Would down-and-out parents do a better job of rearing their children if parent training came with incentives—a job, literacy classes or even a family trip to Epcot Center in Florida?

Would more students succeed in school if they had job guarantees and adult partners to help them over the humps?

These are among dozens of questions addressed by participants in a unique, for Chicago, endeavor aimed at increasing the employability and employment of Chicago's youth.

In October, Mayor Washington called together heads of 35 civic groups, schools, governmental institutions, corporations and business associations. His aim was to devise contracts for each group that bound them to specific activities that would enhance education and employment.

"We are agreement-oriented rather than recommendation-oriented," said mayoral adviser Hal Baron, who is overseeing the project.

Participants in the so-called educational summit donated more than 80 staff members to conduct research, beat the bushes for ideas, check out both local and out-of-state programs and make contract recommendations before next March.

"We've taken all these ideas and thrown them on a board," said Consuelo Williams, executive director of the Cosmopolitan Chamber of Commerce and co-chairman of a summit committee on business support.

Williams came across a program in Chapel Hill, N.C., in which a community development corporation was formed to help vocational students set up their own for-profit businesses. Students in Lowell, Mass., she added, are operating a fast-food franchise and are slated to manage a hotel.

Gene Cartwright and his committee on hiring practices are developing variations of the Boston Compact, which ties job guarantees to improved student achievement in Boston's public schools.

Under one possibility, an independent business consortium would oversee the link-up; special counselors would work with students who pledged to meet achievement, behavior and attendance goals, and a parent, pastor or other adult would support each student.

Cartwright, manager of community and urban affairs for Amoco, said that once the group determines realistic hiring goals—1,000 is a tentative target for the first year—it will seek commitments from 250 to 300 employers in high-growth fields.

"If schools buy in, there will have to be some changes in the classroom," he added.

Gwendolyn Laroche, education director of the Chicago Urban League, said the community involvement committee is exploring incentives for parents to take their children to a library once a month, enforce at-home study time, visit museums and engage in other activities known to promote success in school.

School-community liaisons would recruit parents for the program from schools with particularly low achievement levels, she said.

Chicago Sun-Times
25¢ CITY, SUBURBS 35¢ ELSEWHERE TUESDAY, DECEMBER 18, 1986
FAIR Page 40
5★ Metro Final

Business, schools map guaranteed job pact for grads

By Linda Lenz

Chicago teenagers might get job guarantees—and Chicago businesses would get better-prepared young workers—under agreements being negotiated between representatives of corporate Chicago and the Board of Education.

The negotiations, initiated by Mayor Washington, are patterned after those in Boston, Baltimore and other cities, which have yielded job guarantees as incentives for schools to improve their educational programs and for students to stay in school and work harder.

"If the teacher in the classroom can point to some realistic job expectations, there is a better chance of a student saying he will hang in there," said Chris Ronnow, vice president for community affairs at Harris Trust & Savings Bank and co-chairman of a committee devising terms for an agreement between businesses and schools here.

The negotiations were discussed publicly for the first time yesterday as Hal Baron, Washington's senior policy adviser, briefed members of the mayor's advisory committee on School Board nominees on the project, which was begun at a so-called education summit meeting held in October.

Baron said the goals are to upgrade the preparation of city young people for jobs, to assure that graduates with skills have a good shot at jobs and to provide incentives for potential dropouts to stay in school.

"A young person who graduates from Marshall High School reading at the 11th-grade level does not have the same job possibilities as the young person graduating [in] Arlington Heights at the 11th-grade

Turn to Page 8

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Businesses and schools map guaranteed job pact for grads

Continued from Page 1

level," Baron said.

A forthcoming research paper for the group will show that in Chicago, Detroit, Cleveland and other Midwestern cities, suburban graduates are employed more often than city counterparts who have the same achievement-test scores, he said.

Baron said that in March the summit participants will unveil a package of "contracts" involving not only businesses but also community groups, universities, City Colleges of Chicago and other governmental bodies.

September, 1987, is the target date for putting the terms of the contracts into effect.

Topics being explored include support for parents, funds for community groups, professional development programs for teachers and mentors for inner-city students, Baron said.

The summit participants comprise the heads of 35 institutions, organizations and businesses, who together have donated the time of more than 80 employees to do leg work for the group.

"I am more optimistic about this effort than any I've seen before," said Fred Hess, executive director of the Chicago Panel on Public School Policy and Finance and a summit meeting consultant hired by the mayor's office. "The range of discussion and ideas is really quite exciting."

Ronnow said, "The size, racial composition and history of Chicago make our task quite a challenge. I would like to believe there is a new spirit of cooperation."

A background paper prepared for the summit meeting outlined the interlocking problems confronting the city and the summit participants:

- Forty-three percent of the freshmen in Chicago public high schools do not graduate, and more than a third of those who do graduate "are so limited in basic skills that they are 'at risk' in the labor force."
- The shift in jobs from manufacturing to services has raised skills required for stable, adequately paying jobs while increasing the number of low-paying, low-security, dead-end jobs.
- Even for low-skill jobs, employers will increasingly demand literacy and basic computational skills.
- Job growth is so small that even if all students graduated with skills, there would still be youth unemployment, which last year was 32 percent in Chicago.
- Without the prospect of consistent employment, youths too frequently turn to alcohol and narcotics, street gangs and other illicit activities.

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Chicago Tribune

December 16, 1986

Working business into school

Mayor negotiating jobs-for-achievement tradeoff

By Casey Banas
Education writer

An "education summit" convened by Mayor Harold Washington is seeking to negotiate agreements between the Chicago Board of Education and businesses in an effort to reduce the 43 percent school dropout rate in the city and 32 percent youth unemployment rate.

Under preliminary consideration is the "learn-earn" concept, begun in Boston in 1982, in which the schools promise specific student achievement improvement and increased skills in return for promises by businesses to provide a specific number of jobs to graduates.

"The goal is to fashion a set of agreements between these various parties," said Harold Baron, a policy adviser to Washington and the mayor's point man in the talks.

The talks began Oct. 21 among 35 representatives from the school board, City Colleges of Chicago and business, civic and community groups and city officials.

The severity of the city's education and youth employment problem was underscored in a report presented at the education summit projecting that of 30,000 freshmen entering city public high schools in 1985, only 9,000 will graduate in 1989 with average or above achieve-

Continued on page 2

Schools

Continued from page 1

ment.

Another 6,500 will graduate, but will read two or more years below grade level. Another 11,700 will drop out, though 2,500 of those eventually will graduate from alternative high schools or pass the high school diploma equivalency exam. An additional 2,800 will transfer to schools outside the Chicago public school system.

Meanwhile, the 1985 Chicago unemployment rate for 16- to 24-year-olds was 32 percent. It was 51 percent for black males 16 to 19 years old.

But the education summit report said that even graduates with average or above achievement who are not going to college "will still have difficulty in obtaining jobs with stability and reasonable progression."

Baron said the city is to release a study soon showing that the Chicago public high school student who graduates with the same reading and math achievement scores as his or her suburban counterpart has less of a chance at a job than the suburban youth.

Dropouts and graduates lagging in academic ability "will face difficulty in getting even marginal jobs," the report said.

Baron disclosed the education summit initiative at a Monday meeting of the Citizens Nominating Committee for the Board of Education. Two members brought up additional obstacles that must be surmounted.

Slim Coleman, from the Heart of Uptown Coalition, said a young person can make $100 a day on the street selling drugs, prompting other teenagers to ask why they should continue in school and wait to earn money.

And Virgil Carr, president of United Way of Chicago, said the Chicago job market is not booming and even though 100,000 jobs were added in the last four years, "most are $7,000- to $8,000-a-year jobs."

Baron acknowledged the problems, but said, "You can't be paralyzed."

Kris Ronnow, vice president for public relations for the Harris Bank, one of the businesses in the summit, said: "I do hope something will come out of the talks. It certainly has a positive effect in other cities."

Ronnow and Baron referred to the Boston Compact, where school officials promised a 5 percent reduction in student absenteeism and dropouts, and competency-based graduation requirements in reading and mathematics. Businesses agreed to recruit 200 companies into a program giving preferential hiring to Boston graduates, expand a job counseling program, provide 1,000 summer jobs and hire 400 graduating seniors.

Baron said the Chicago initiative will seek to go beyond the Boston Compact. In addition to school-business agreements on better student preparation and more jobs, he has urged an expanded group of 80 participants in six study groups to consider ways to help dropouts and low achievers facing a lifetime in a "dead-end job" with little prospect for promotion or big salary gains.

A person reading on a 6th grade level who attends a literacy class and improves to a 10th grade level should know that a better job is available because of his efforts, Baron said.

The education summit also has the "unspoken mission" of creating momentum to improve the schools and "to get people to believe once again that you can do something about education," Baron said. "People have been pretty disheartened about the capacity to improve education in Chicago."

Though the latest school improvement initiative is only one of many that stem, with little success, from the 1964 integration plan by a panel headed by University of Chicago sociology professor Philip M. Hauser, Baron contends this one has a better chance of success.

Others have focused on sweeping changes in the school system that often had large price tags. Baron said the goal of the education summit will be to negotiate specific agreements with specific numbers in education and business that will be monitored for three to seven years.

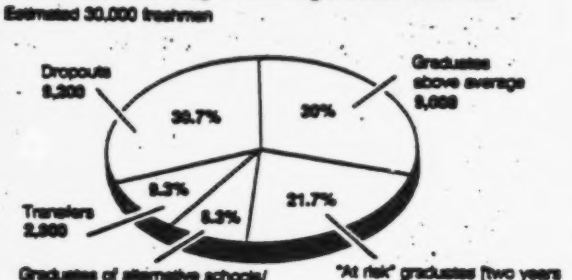
The target date for agreements is mid-March. The starting date would be next September.

Baron said Washington asked his staff to organize the talks by focusing on specific ways to improve the schools and cut youth unemployment instead of urging general improvements.

Class of 1989

Projections for Chicago Public High School freshmen

Estimated 30,000 freshmen



Chicago Tribune Graphic; Source: Briefing paper for Mayor Washington's Education Summit

VITAE'
VINCENT J. SERRITELLA

MANAGEMENT

Consulted with small business and state and local government in the areas of marketing and public relations, work planning and control, organizational development, team building, personel management, MBO processes, and cutback management. Completed many of these tasks in a cross-cultural environment.

Managed day-to-day functions of a federal agency of four divisions totaling over 130 staff. These responsibilities included policy planning and development, program operations, performance appraisal, liaison with the national office, and program assessment. Created a model work planning and control system which integrates MBO processes with individual work scheduling.

Advised units of local government in the planning, management, funding, operation, and assessment of human resource programs.

Served as principle spokesman for a federal agency in regards to private sector program coordination, new legislation, small and minority business development; act as liaison with members of congress, chief elected officials, officials from other federal agencies, and members of the private business community in relation to the activities of employment and training programs.

As Vice President serves as lead manager and principle spokesman for the National Alliance of Business in a nine state region surrounding the Great Lakes with over 150 local programs and 75 Business Roundtable Companies. Supervise a staff of eight, with 5 professional consultants-trainers.

Have developed the Midwest Regional Service Office of the National Alliance of Business as one of the most successful operations in the county. The region has piloted NAB's business consulting services and delivered 3 marketing programs for disabled workers, training institutes for state and local managers, and high impact organizational development programs for public and private agencies.

Developed program and strategy integration with six state human resource systems (JTPA, public welfare, vocational education). Review state agency policies, procedures, recommendations and provide feedback. Conduct and oversee on-site program reviews/ audits, and conduct mediation services with community organizations as requested.

MANAGEMENT (cont.)

Facilitated a series of public/private partnerships between local, state and federal governments and agencies, with an especially high impact in three key cities. Viewed by state government in the region as the public-private partnership organization.

ADMINISTRATION

Served as agency representative and grant manager for a federal employment and training program with state government. Conducted all phases of grant management including fund control, monitoring, consultation, liaison, and program and issue facilitation. Interacted with elected officials at all levels of government and members of the business community.

Acted as chief operating official of a human resource agency with over 30 staff, three schools, and two clinics.

Coordinated a federal program which mandated private-public sector interface. Managed all aspects of the program including policy development, reporting structures, program consultation, promotion, and organization development-training. Conducted on-site consultation with over 75 private industry councils over a six state area.

Served as the functional deputy of a federal regional agency of 150 employees overseeing a multi-million dollar admin budget and a $500,000,000 program budget. Responsible for day-to-day operation of the agency.

PLANNING-POLICY DEVELOPMENT

Instituted a unified system approach in private sector organizations (service industry, light durable, health) with an emphasis on the integration of all organizational planning systems.

Refined high complex strategic planning processes for use by single owner operator firms.

Developed a series of human resource plans for units of local government with emphases on employment and training, mental health, economic development, housing, and HUD/701 service plans. Wrote over 30 manpower plans under the aegis of the Comprehensive Employment and Training Act.

Created a model for categorizing and integrating human resource delivery systems which was used by several jurisdictions across the country.

Developed marketing plans for single owner-operated service companies and human resource agencies. Instituted a direct marketing process for several small service companies.

TRAINING

Conducted numerous training symposia in the following areas:

- o human resource planning
- o work control/planning
- o strategic planning for small business
- o marketing and public relations
- o team building
- o MBO
- o program assessment
- o organization development
- o performance appraisal
- o supervisory development

Conducted over 40 sessions in the area of organizational development for private industry councils and chambers of commerce.

EDUCATION AND EXPERIENCE

American Airlines; Passenger Service, Manager Departure Coordination

United States Peace Corps; Volunteer and Professional Staff

Under contract with Regional Planning Commissions

Private Consultant to Small Business and Local Government

U.S. Department of Labor, Employment/Training Administration; Federal Representative, Management Assistance Specialist, Private Sector Coordinator, Special Assistant to Regional Adm. Executive Assistant to Regional Administrator.

National Alliance of Business; Regional Vice President

B.S. and M.S. Organizational Sociology

LOUISE A. BERTSCHE

Ms. Bertsche, Regional Manager for the National Alliance of Business, Region V Midwest Office, has specialized in the development, administration, and evaluation of business assistance and employment and training programs. She is experienced in all phases of design and management of competency-based training programs to meet local employer requirements.

Director, Training and Development, the Business Institute, Chicago City-Wide College. The Business Institute is a human resource development center designed to promote business development and growth through service to Chicago residents. Responsibilities included design and development of the Training and Development Division, operations management for the Institute and design and management of a competency-based program in basic skills, job-seeking skills and career planning services. Designed competency-based curricula in bank teller operations through job/task analyses at major Chicago financial institutions. Developed customized training opportunities with Chicago companies and provided oversight in implementation.

Consultant to the Alternative Schools Network, Chicago, Illinois, in Basic Skills Training for the Economically Disadvantaged. Provided technical assistance services in program design, implementation, and evaluation of the Comprehensive Competencies Program (CCP) to 20 sites throughout Chicago. CCP is a competency-based program in basic and functional skills developed by Dr. Robert Taggart, Remediation and Training Institute, based upon the Job Corps curricula, and includes automated evaluation and reporting systems suitable for use by community-based organizations.

Training Design Manager for the Design and Marketing of Microcomputer Training for the Center for Systems Technology. Developed a competency-based training model in microcomputer skills based upon a skills needs assessment/analyses in Chicago and Cook County and provided technical assistance in its implementation. This program model serves as a core curriculum for the suburban Cook County Center for Systems Technology, a regional multi-faceted training institute serving area needs for qualified workers with skills in emerging demand occupations.

Director of the Word Processing Center, a Model Skill Training Program, for the Chicago Private Industry Council. Responsibilities included management of all phases of program development, curriculum development, operations, design, and implementation of financial job development, fund raising, marketing, coordination with outreach, intake and assessment organizations, and liaison with a task force of corporation representatives who assisted in program design, implementation, and hiring of program graduates. Responsible for staff supervision, oversight to participant selection and training, and assessment of their progress in attaining program competency objectives.

Project Manager to Design and Test the Technology Exchange System for the Private Industry Council of Suburban Cook County, Illinois. Technology Exchange is a consolidated system for marketing and delivering training and employment services to companies under the Job Training Partnership Act. System components included marketing a flexible array of services to identified market segments, and provision of customized services in partnership with a community based organization. One facet of this effort was the identification of skill requirements for medical transcriptionists through job analyses with local employers.

Staff Associate for a Skill Needs Assessment Survey and Marketing Strategy Development for the Private Industry Council of Suburban Cook County, Illinois. Responsibilities included identification of growth industries and occupations in Suburban Cook County and interviews with private employers to identify skill requirements for selected high growth occupations as a basis for the design of skill training programs tailored to industry needs. Also responsible for development of interview guides and interviewer training; assisted in the development of a PIC marketing strategy emphasizing economic development. Included training of PIC staff in interview and marketing techniques for private sector employees.

Staff Associate for a Project to Assist the Chicago Private Industry Council in the Design and Implementation of a Model Skill Training Program in Word Processing. Assisted in the development of program operating specifications for a model training program tailored to the specifications of major Chicago corporations. Duties also included presentations to a task force of corporation representatives and identification of community resources to supplement program services to participants.

Staff Associate for the Process Evaluation of the Consolidated Youth Employment Program (CYEP) Demonstration Project for the U.S. Department of Labor, Office of Youth Programs (OYP). Responsibilities included the development of research instruments, data analysis, and report writing. Acted as site observer to evaluate the progress of two of the 14 demonstration sites in implementing a consolidated, individulalized approach to the provision of youth services.

Staff Associate for the Development of a Program Design to Improve the Delivery of CETA Services for the Louisville-Jefferson County CETA Consortium. Duties included review, documentation and modification of the CETA service delivery system through the development of work statements and Requests for Proposal for all service components.

Staff Associate for a Study of Emerging Occupations and Training Needs for the Boston Private Industry Council, Incorporated. Responsibilities included analysis of interview data, formulation of findings and recommendations and report writing.

Research Project Specialist for the Evaluation of Municipal Health Services Program Demonstration in Five Cities. Assisted in all phases of the evaluation of a demonstration service delivery system and the effects of waiving certain Medicare payament restrictions. Responsible for writing quarterly and annual reports and analyzing data needs. Participated in questionnaire design and design of research strategies. Extensive work with federal, state and local agency administrators and staff persons.

Intern for the Mayor's Office of Manpower (Chicago, Ilinois), Evaluation Division. Developed and implemented an evaluation of Chicago's youth employment and training program.

Intern for the National Urban Coalition. Developed a layman's guide to CETA and a housing grant proposal.

Academic Background

Master's Degree in Social Service Administration, University of Chicago, 1978.

Bachelor's Degree, magna cum laude, in Sociology, Ithaca College, New York, 1976.

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Home Telephone: (219) 397-0318

EDUCATION:

STANFORD UNIVERSITY, School of Education, June 1976
M.A. — Curriculum Development
Elective Coursework — Educational Administration and Research

PURDUE UNIVERSITY, School of Education, June 1971
B.A. — Elementary Education

EMPLOYMENT OBJECTIVE:

Management opportunity in the area of Human Resource Development and Training.

EMPLOYMENT:

June 1984 to Present

Lake County Job Training Corporation — Gary, Indiana
Director Youth Programs
Responsible for the planning, development, oversight and evaluation of uniform effective training and employment programs for youth under the federally funded Job Training Partnership Act (JTPA). Duties include: supervising a county-wide, nucleus staff of eight people and a summer staff of over 500 employees and youth supervisors; assisting in the negotiations for the award of contracts to training vendors, expenditures for youth programs in fiscal year 1986 totalled $7,875,032; coordinating the Summer Youth Employment and Training Program (SYETP) for disadvantaged youth of Lake County, Indiana, approximately 5000 youth ages, 14 years through 21 years, received summer internships in both public and private sector worksites; coordinating in-school youth programs for the sixteen high school corporations in the county; design, implementation and oversight for all programs geared toward school dropouts, unsubsidized job placements for this target group exceeded state mandated performance standards. Responsible for assisting in the development and implementation of an innovative, exemplary youth program entitled, "Career Beginnings." This program was funded by Brandeis University and the commonwealth Fund in Waltham, Massachusetts.

Nov. 1981 to July 1983

Kuwait Institute for Scientific Research (KISR) — Kuwait
Training Specialist
Responsible for development and implementation of formalized On-Job-Training (OJT) programs for Kuwaiti and Arab nationals within the scientific/technical research divisions at KISR. Worked directly with supervisors to develop individualized OJT programs for university recruits. Duties included: Interviewing supervisors and trainees to determine program content; designing the OJT programs which were formalized in terms of a written program incorporating specific and measurable learning objectives to be achieved by agreed upon target dates; developing an evaluation model including monitoring, and submission of formative and summative evaluations. In addition, conducted training seminars on analysis of training needs, development, and implementation of training plans and procedures, preparation of OJT programs and supervision of special courses. Participants included training specialists and personnel managers from a cross section of regional corporations and local industries (oil, banking, small/large business) within the Persian Gulf states of Kuwait, Bahrain, United Arab Emirates and Saudi Arabia. *Wrote and published brochure on OJT policies and procedures at KISR.*

June 1980 to June 1981

Mayor's Office of Employment and Training — Chicago, Illinois
Senior Manpower Planner
Responsible for providing technical assistance in the design, organization and implementation of employment, educational and training programs for the City of Chicago through the auspices of the Private Industry Council (PIC). Duties included serving as staff to the Education Program Development committee of the PIC which represents the corporate community; assisting in the development of new training concepts and negotiating, developing and recommending funding of qualified agencies for CETA funds.

Sept. 1977 to May 1980 — **Department of Health, Education and Welfare** — Washington, D.C.
Educational Consultant

Worked as a private consultant to three agencies within HEW.

- **Office of Education** – Responsible for reviewing, evaluating and recommending funding for educational program proposals submitted by post-secondary institutions to the Office of Education, HEW.

- **Administration on Aging** – Responsible for developing the methodology for a study funded by the Administration on Aging/HEW. Duties included designing the survey instrument, training interviewers, monitoring and interpreting data obtained on senior citizens in the Washington metropolitan area.

- **National Academy of Sciences/Committee on Minorities in Engineering and Technology** – Responsible for assisting the Committee's Office of Education to initiate legislation to enhance minority and women's participation in the area of science and math programming. Served as a field representative to the Committee by assisting in the development of local pre-college engineering programs in Houston, Phildelphia and Washington, D.C. Wrote and published the *Precollege Guide for Development of Local Engineering Education Programs*.

Sept. 1976 to August 1977 — **Educational Fellowship Policy Program** — Washington, D.C.
Educational Policy Analyst
One year assignment as an educational policy fellow in the Office of the Assistant Secretary for Education/HEW. Duties included making recommendations regarding change in current federal education policy in the area of: Title I, ESEA legislation, Title IX, women's education programs and school desegregation; prepared issue papers, and action plans related to the formulation of educational policy for final action by the Commissioner of Education. Responsible for coordinating the Department's first Public hearing on ESEA Reauthorization.

Sept. 1975 to May 1976 — **Stanford University** — Palo Alto, California
Research Assistant
Responsible for formulating and administering questionnaires, and compiling, evaluating and interpreting the data from recently desegregated school districts in the San Francisco Bay area. Additional duties included holding in-service workshops with parents, teachers and administrators, on implication of the study.

Summer of 1975 — **NASA/Ames Research Center** — Moffett Field, California
Child Care Coordinator
Wrote a proposal for a Child Care Center at NASA; the proposal was funded; an on-site Child Care facility now exists.

Sept. 1971 to May 1975 — **Palo Alto Unified School District** — Palo Alto, California
Teacher

Taught first and third grades and served as advisor for the district to the California state-funded Reading and Language Arts Textbook Review Committee.

REFERENCES: References furnished upon request

RUTH Y. KIM
3354 N. Broadway
Chicago, IL 60657
312/327-6585

SKILLS

Administrative and Management Skills

- Proven ability in managing staffs, projects, programs and budgets.
- Proven ability in managing information collection and distribution.
- Experienced in coordinating and planning meetings and special events.
- Results oriented. Detail oriented. Excellent planning skills.

Communication Skills

- Excellent written and verbal skills.
- Experienced in general business correspondence.
- Developed skills in press release and speech preparation.
- Experienced in funding proposal preparation.
- Bilingual abilities in Korean and French.

Practical Skills

- Design, layout, production and photography skills.
- Experienced in operating general office equipment.
- Extensive word processing equipment experience.
- Experienced in literature research.

SUMMARY OF EMPLOYMENT

Associate Director -- Chicago United, Inc.
116 S. Michigan Avenue, Chicago, IL 60603
(July 1986 -- February 1987)

Chicago United, Inc., is a not-for-profit business and civic leadership association dedicated to improving Chicago's socio-economic climate through economic development and education.

Provided staff support for Education Task Force and Education Core Committee, including preparation of meeting agendas and necessary background materials. Monitored activities of the Chicago Public Schools and Chicago Board of Education. Served as a representative at CPS functions. Participated on the School Improvement Work Group of the Mayor's Education Summit. Conducted funding campaign and consultant searches for special projects. Served as a representative to the Chicago Panel on Public School Policy and Finance/Research Committee, Coalition to Keep our Schools Open, Coalition on School Board Appointments/Citizen's Nominating Committee and various other citywide education watchdog organizations.

Administrative Assistant/Executive Secretary -- Chicago United, Inc.
116 S. Michigan Avenue, Chicago, IL 60603
(August 1985 -- July 1986)

Provided staff support to Vice President of Programs and an Associate Director. Responsibilities included coordination of bimonthly Deacons meetings, preparation and research for activities in the areas of education, corporate philanthropy, economic development, minority business development and public policy. Interfaced with senior management officers of major Chicago-based corporations. Prepared budget for office amenities.

Research Technician -- University of Notre Dame
Department of Biological Sciences, Notre Dame, IN 46556
(September 1984 -- June 1985)

Research in the Department of Biological Sciences centers around the University of Notre Dame's strong entomology department.

Responsibilities included overseeing daily activities of a molecular biology laboratory, supervision of student workers, preparation of daily stock solutions, maintenance of insectory, inventory of chemicals and supplies, preparation for DNA and RNA isolation, and maintenance of tissue culture.

English Instructor -- Kyung Hee Girls' High School and Elementary School
Kyung Hee Educational Center, Seoul, Korea
(February 1983 -- August 1983)

Kyung Hee Educational Center is a private educational institution covering grades kindergarten through graduate school.

Responsibilities included lesson preparations for students in grades 6-11, development and management of the high school's first language laboratory, instruction of five high school sessions and six elementary school sessions per week.

Inter-library Loan/Circulation Assistant -- Indiana University at South Bend
University Library, South Bend, IN 46615
(September 1980 -- May 1981; October 1983 -- September 1984)

University Library is the primary library on the Indiana University campus.

Responsibilities included all aspects of the inter-library loan and circulation departments.

EDUCATION

Indiana University
Bloomington, IN 47405

Earned a B.A. in 1982, majoring in forensics studies and biology, with minors in chemistry, education and psychology.

Teacher certification was earned in 1982 for middle and secondary biology and chemistry.

Indiana University at South Bend
South Bend, IN 46615
MA course work in secondary science education.

COLLEGE AFFILIATIONS

Alpha Omicron Pi Social Sorority
Indiana University Student Foundation -- Little 500 Chairperson
Indiana University Student Alumni Council
Indiana Memorial Union Board -- Kiva Coffee Shop
Volunteer Service Bureau -- Indiana Boys Schools
Indiana University at South Bend Philharmonic Orchestra
Indiana University Alumni Association

COMMUNITY INVOLVEMENT

1986 -- Present -- Korean Community Council, steering committee member for the creation of a newsletter for second generation Korean Americans.

1986 -- Present -- Literacy Council of Chicago, adult literacy tutor.

1986 -- 1987 -- YMCA City Youth and Government Program, volunteer advisor.

1985 -- 1986 -- Lincoln Park Shelter, overnight shelter volunteer.

1985 -- 1986 -- Midwest Presbyterian Church, Sunday school teacher and youth activities coordinator.

REFERENCES

References are available upon request.

Mr. Fred M. Montejano
Associate Director
Chicago United, Inc.
116 South Michigan Avenue
Chicago, Illinois 60603
(312) 236-3769

Mr. William W. Higginson
President
Chicago Equity Fund
14 West Erie
Chicago, Illinois 60611
(312) 943-2266

Ms. Clare M. Munana
Consultant
Grant - Thornton International
Prudential Plaza, 6th Floor
Chicago, Illinois 60601

Mr. David J. Paulus
Senior Vice President
Community & Government Affairs
First National Bank of Chicago
One First National Plaza
Chicago, Illinois 60670
(312) 732-2264

Ms. Dora A. Arechiga
Associate Counsel
MALDEF
343 South Dearborn Street
Chicago, Illinois 60604
(312) 427-9363

Ms. Susan Fissinger
Accounting Manager
Staley Commodities, Inc.
2221A Board of Trade Building
Chicago, Illinois 60604
(312) 341-4492

RESUME

Robert A. Cronberg, Jr.
18344 Torrence Avenue-Apt. 3E
Lansing, IL 60438
Phone: (312) 474-0062
Work Phone: (312) 443-4740

30 E Huron (Huron Plaza)
Apt 807
60611

Date of Birth: June 12, 1953

EDUCATION

High School: **Evanston Township High School, Evanston, IL 60202**
1968-1971

College: **Cornell College, Mt. Vernon, Iowa 52406**
1972-1976 Bachelor of Special Studies (B.S.S.)
Majors: Elementary and Secondary Education, Sociology

Graduate Study: **DePaul University, Dept. of Education, Chicago, IL 60201**
1980-1981

Governor's State University, College of Business and Public Administration, University Park, IL 60466
Masters of Public Administration (MPA). Currently enrolled in program (working on thesis).
1983

Cumulative Grade Point - **4.0 out of 4.0**

Fellowship to Governor's State University awarded through the Amoco Foundation

EMPLOYMENT HISTORY

June, 1984 to Present

Cook County President's Office of Employment Training
118 North Clark Street-Room 1020
Chicago, IL 60602

FISCAL MANAGER - I currently have direct responsibility for all financial functions and transactions of the Federal Job Training Partnership Act for Cook County Government. This includes all areas of budgeting and financial planning for the Cook County President's Office of Employment Training.

Sept. 1983 to Present

Amoco Foundation Fellow
The Institute for Public Policy and Administration
Governor's State University
University Park, IL

I conduct basic research for the institute in areas highlighting regionalism throughout the State of Illinois (102 counties), particularly focusing on data relevant to trends in state sales tax, property tax and educational aid distribution.

EMPLOYMENT HISTORY (cont'd)

Oct. 1983 to June, 1984

Cook County President's Office of Employment Training
118 North Clark Street-Room 1020
Chicago, IL 60602

SUPERVISOR/LABOR MARKET DEVELOPMENT - I was primarily responsible for developing and writing Cook County's basic Employment and Training Grant based on the Job Training Partnership Act (JTPA) to the Illinois Department of Commerce and Community Affairs (DCCA). In addition, I gathered, developed and incorporated all labor market information statistics from both the City of Chicago and Suburban Cook County for inclusion in all Cook County labor force reports.

1982

Associates for Career Development, Inc.
6101 North Sheridan Road
Chicago, IL 60660

GRANT CONSULTANT

June, 1980 to Oct. 1983

Private Industry Council of Suburban Cook County
President's Office of Manpower Services
110 Lake Street
Oak Park, IL 60301

PROGRAM PLANNING MANAGER - I had the responsibility for reviewing all Employment and Training Program proposals for appropriateness of training, feasibility, curriculum outline, accuracy and conformity with existing Federal law and regulations. I worked with employers, Chambers of Commerce, Trade and Business Associates, Community Based Organizations, and Agencies to identify, plan and develop Title VII Employment and Training Programs. Additionally, I had the responsibility for preparing the TItle VII Annual Plan Subpart for review by the Private Industry Council and Cook County Manpower Planning Council prior to submission to the U.S. Department of Labor as part of Cook County's Comprehensive Employment and Training Annual Plan.

1977 to June, 1980

St. Anne's Elementary and Junior High School
3014 Ridge Road
Lansing, IL 60438

1) Director, Curriculum and Vocational Education, 1978-1979
2) Science Department Head, 1978-1979
3) Mathematics Department Head, 1977-1978
4) Consultant, Science Curriculum of Chicago Archdiocese School Board, 1978-1980
5) Teacher, 1977- 1978

1975 to 1976

National Education Association
1201 16th Street, N.W.
Washington, D.C. 20036

1) Appointed member, Standing Committee on Instruction and Professional Development (See attached article)
2) Appointed member, Standing Committee on Human Relations

EMPLOYMENT HISTORY (cont'd)

1975 to 1976

Iowa State Education Association
4025 Tonawanda Drive
Des Moines, Iowa 50312

1) Appointed member, Professional Rights and Responsibilites Commission (See attached article)

1975 to 1976

Student Iowa State Education Association
4025 Tonawanda Drive
Des Moines, Iowa 50312

1) President (See attached article)
2) Chairman of Executive Committee
3) Chairman, Board of Directors

COMPETENCIES

Short and long range planning analysis and scheduling

Curriculum design and development/systems analysis

Budgeting/Financial Planning Management

Multi-Department Management

In-service programming and development

PUBLICATIONS AND PRESENTATIONS

"The Undermining of Change in Educational Institutions: An Organizational Analysis". Paper presented at the 3rd Annual Conference,National Association for Asian and Pacific American Education. (1981) Published through the Eric Clearinghouse on Urban Education. Indexed in Resources In Education.

"A Step Trhough the Looking Glass: Speculative Fiction and Contemporary Art in Modern Society". Eric Clearinghouse on Social Studies (September, 1981).

"Regionalism as Reflected in the Differential Collection and Distribution of Sales Tax in the State of Illinois". Paper presented at Crossroads '84 Conference (1984) at Sangamon State University, Springfield, IL. Published by The Institute for Public Policy and Administration as "Regionalism and the Illinois Sales Tax". (1985) #RR85-105

AWARDS

1985

American Society for Public Administration

Outstanding Graduate Student for 1985

April, 1985

Governor's State University - College of Business and Public Administration

Student of the Year Award

NATIONAL ALLIANCE OF BUSINESS
DACUM TASK ANALYSIS AND SURVEY VERIFICATION
OCCUPATION: ORDER CLERK
JULY 22-23, 1987

DESCRIPTION: Order clerks process requests received from customers or company employees for products, services or materials. They may receive orders by mail, phone order forms, computer terminals, or directly from people. In some cases, they phone or write people to inform them of prices, shipping dates, delays or other information about their orders. They also may send orders to departments to be filled and follow-up orders to make sure of prompt delivery. Some help prepare written contracts for goods or handle service orders and complaints.

	TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY A:	**PROCESS ORDERS**			
TASKS:	1. Answer phone calls	4.9	5.0	1.9
	2. Take/enter orders	4.9	5.0	3.5
	3. Provide product information	4.1	4.9	3.4
	4. Provide pricing information	4.5	5.0	3.3
	5. Provide billing information	4.0	5.0	3.4
	6. Provide delivery information	4.4	5.0	3.3
	7. Arrange for installation/serivce	2.3	3.5	2.0
	8. Finalize transactions	4.5	4.9	3.1
	9. Record mail order payments (N/A)	2.2	2.7	1.8
DUTY B:	**PROVIDE CUSTOMER SERVICES**			
TASKS:	1. Establish customer rapport	3.9	5.0	2.2
	2. Handle complaints	4.0	4.5	3.7
	3. Handle special accounts	3.4	3.5	3.7
	4. Provide general information	3.3	4.4	2.6
	5. Respond to customer correspondence	3.7	3.8	3.0
	6. Update customer information	4.0	4.0	2.7
	7. Issue refunds/credits	3.9	3.5	3.5
	8. Authorize returns (N/A)	3.1	3.4	2.7
	9. Process merchandise returns (N/A)	2.5	2.6	2.4
	10. Adjust pricing	4.0	3.7	2.2
	11. Suggest substitute merchandise	3.7	4.4	3.3
	12. Provide additional sales options	3.0	3.5	2.9
	13. Solicit credit applications	2.3	2.1	1.4
	14. Process sample requests	2.4	3.1	2.0
	15. Distribute printed information	2.5	2.7	1.0

	TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY C:	**COMMUNICATE WITH OTHER DEPARTMENTS**			
TASKS:	1. Forward complaint information	3.8	3.0	1.7
	2. Forward payments	4.0	3.2	1.8
	3. Forward lost business or new business information	3.0	1.7	1.5
	4. Forward applications for credit approval	2.4	1.3	1.0
DUTY D:	**EXPEDITE ORDERS**			
TASKS:	1. Contact vendors	3.8	3.7	2.8
	2. Verify shipments (N/A)	4.3	3.4	3.0
	3. Review backorder status	4.0	4.7	3.0
	4. Provide special shipping (N/A)	4.4	4.6	2.6
	5. Request proof of delivery (N/A)	3.5	2.6	2.3
DUTY E:	**CONTROL INVENTORY**			
TASKS:	1. Receive merchandise	1.0	0.8	0.5
	2. Insure proper storage and handling of merchandise	0.3	0.6	0.5
	3. Locate merchandise	1.0	1.0	0.0
	4. Rotate stock	0.0	0.0	0.0
	5. Take inventory	1.0	0.8	0.3
	6. Replenish display stock	0.0	0.0	0.0
	7. Reorder stock	0.0	0.0	0.0
DUTY F:	**UPDATE PRODUCT INFORMATION**			
TASKS:	1. Process requests for informational updates	0.7	1.3	0.3
	2. Organize supply information	0.7	1.0	0.3
	3. Conduct product surveys	0.0	0.3	0.3
	4. Attend product seminars	1.3	1.0	0.7
DUTY G:	**MAINTAIN WORK ENVIRONMENT**			
TASKS:	1. Set daily agenda	3.7	5.0	2.7
	2. Maintain tickler file	3.0	4.3	2.3
	3. Maintain display area	1.0	0.3	0.0
	4. Organize office supplies	2.0	2.7	1.0
	5. Maintain individual files	3.0	2.7	1.3
	6. Attend customer service workshops	1.0	0.7	0.7
	7. Provide on-the-job training	2.7	2.0	2.0

JOB COMPETENCIES	IMPORTANCE
KNOWLEDGE:	
1. Basic awareness of department operations	3.5
2. Knowledge of computer operations	2.3
3. Telephone etiquette	4.8
ATTITUDES/TRAITS:	
1. Dependability	4.8
2. Work independently	4.4
3. Punctual	4.4
4. Personable	4.0
5. Conscientious	4.3
6. Reliable	4.6
7. Hard worker	4.4
8. Team player	4.0
SKILLS:	
1. High school reading	4.9
2. Pleasant and understandable voice	4.6
3. Typing	2.5

DACUM PANELISTS:

Margie Baker
Peoples Gas, Light & Coke Co.

Cheryl C. Everett
Sears, Roebuck & Co.

Gwendolyn Jones
The Reliable Corporation

Fran McCormick
Baxter Travenol

Matthew Tapling
Walgreens Drug Store

Charlie Wade
The Reliable Corporation

SURVEY PARTICIPANTS:

Margie Baker
Peoples Gas, Light & Coke Co.

Gwendolyn Jones
The Reliable Corporation

Fran McCormick
Baxter Travenol

Matthew Tapling
Walgreens Drug Store

Cheryl C. Everett
Sears, Roebuck & Co.

Mary Kumpfer
Baxter Travenol

Ruby Reed
Baxter Travenol

Charlie Wade
The Reliable Corporation

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements

DUTY A: PROCESS ORDERS	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Answer phone calls	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Take/enter orders	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Provide product information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Provide pricing information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Provide billing information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Provide delivery information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Arrange for installation/ service	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
8. Finalize transactions	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
9. Record mail order payments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements

DUTY B: PROVIDE CUSTOMER SERVICES

	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Establish customer rapport	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Handle complaints	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Handle special accounts	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Provide general information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Respond to customer correspondence	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Update customer information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Issue refunds/credits	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
8. Authorize returns	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
9. Process merchandise returns	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
10. Adjust pricing	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
11. Suggest substitute merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
12. Provide additional sales options	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
(Continued next page)	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements

DUTY B: PROVIDE CUSTOMER SERVICES (cont.)	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
13. Solicit credit applications	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
14. Process sample requests	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
15. Distribute printed information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY C: COMMUNICATE WITH OTHER DEPARTMENTS																		
1. Forward complaint information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Forward payments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Forward lost business or new business information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Forward applications for credit approval	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY D: EXPEDITE ORDERS																		
1. Contact vendors	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Verify shipments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Review backorder status	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Provide special shipping	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Request proof of delivery	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY E: CONTROL INVENTORY																		
1. Receive merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Insure proper storage and handling of merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Locate merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Rotate stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Take inventory	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Replenish display stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Reorder stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY F: UPDATE PRODUCT INFORMATION																		
1. Process requests for informational updates	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Organize supply information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Conduct product surveys	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Attend product seminars	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY G: MAINTAIN WORK ENVIRONMENT																		
1. Set daily agenda	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Maintain tickler file	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Maintain display area	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Organize office supplies	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Maintain individual files	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Attend customer service workshops	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Provide on-the-job training	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
SKILLS:						
1. High school reading	5	4	3	2	1	0
2. Pleasant and understandable voice	5	4	3	2	1	0
3. Typing	5	4	3	2	1	0
	5	4	3	2	1	0
ATTITUDES/TRAITS:						
1. Dependability	5	4	3	2	1	0
2. Work independently	5	4	3	2	1	0
3. Punctual	5	4	3	2	1	0
4. Personable	5	4	3	2	1	0
5. Conscientious	5	4	3	2	1	0
6. Reliable	5	4	3	2	1	0
7. Hard worker	5	4	3	2	1	0
8. Team player	5	4	3	2	1	0

C[illegible]R CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES KNOWLEDGE:	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
1. Basic awareness of operations of department	5	4	3	2	1	0
2. Knowledge of computer operations	5	4	3	2	1	0
3. Telephone etiquette	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0

NATIONAL ALLIANCE OF BUSINESS
DACUM TASK ANALYSIS AND SURVEY VERIFICATION
OCCUPATION: BILLING, COST & RATE CLERKS
SEPTEMBER 1-2, 1987

DESCRIPTION: A billing, cost and rate clerk compiles data and computes fee and charges to prepare invoices for billing purposes; transcribes data from office records to obtain customer information and an itemized list of purchases and prices, discounts or credits given, and the total; provides billing information to customers; and assist in resolving billing discrepancies.

RELATED TITLES:

1. Account Technician
2. Client Accounting Coordinator - Production, Media
3. Customer Assistance - Billing Errors, Corrections
4. Service Representative

* Denotes advance tasks, not required for entry level employees.

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY A: PERFORM BILLING FUNCTIONS			
TASKS: 1. Review billing schedule	3.8	4.2	4.6
2. Access customer account	4.4	4.5	3.0
3. Update customer information	4.4	4.1	3.0
4. Review customer order for accuracy (problem solving)	3.3	2.2	2.5
5. Determine product/service charges	3.9	3.5	3.6
6. Determine appropriate taxes	3.5	3.0	3.3
7. Determine overhead/other fees (N/A)	2.0	1.5	2.1
8. Determine discounts	3.4	2.6	3.7
9. Generate billing documents	4.8	4.0	4.3
10. Assemble/distribute billing documents	3.1	2.8	2.2
11. Report billing activity	4.3	2.5	2.3
12. Reconcile accounts	3.7	3.3	3.5
*13. Assist auditors	2.1	0.7	1.5
DUTY B: ESTABLISHING NEW BILLING FILES			
TASKS: 1. Verify credit approval	1.8	0.9	1.9
2. Assign customer number	3.7	2.7	3.1
3. Input billing data	4.9	4.4	4.3
4. Distribute "new customer" information	3.4	2.7	2.7

	TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY C:	**RESOLVE BILLING PROBLEMS**			
TASKS:	1. Research customer inquiry	4.6	4.4	4.1
	2. Notify appropriate department	4.1	4.6	2.6
	3. Verify problem resolution	4.1	4.4	3.8
	4. Issue billing adjustments	4.6	4.2	4.5
	5. Follow-up with customer	4.8	4.0	2.9
DUTY D:	**COMMUNICATE WITH CUSTOMERS**			
TASKS:	1. Receive calls/inquiries	4.6	4.6	3.1
	2. Provide billing information	4.6	4.5	3.4
	3. Document inquiries	4.5	4.5	2.9
	4. Respond to correspondence	4.6	4.5	3.1
	5. Refer customer inquiries to appropriate department	4.2	4.8	2.1
DUTY E:	**COORDINATE DISTRIBUTION (PRODUCT OR SERVICE)**			
TASKS:	1. Verify delivery (N/A)	2.3	1.3	2.0
	2. Installation (N/A)	2.4	1.3	2.6
	3. Determine distribution/shipping costs (N/A)	2.1	1.2	2.9
	4. Determine installation costs (N/A)	2.5	1.5	2.7
	5. Issue back order notification (N/A)	2.1	1.1	2.5
DUTY F:	**PROVIDE INTER-DEPARTMENTAL COMMUNICATIONS**			
TASKS:	1. Answer questions from other departments	4.1	4.4	3.1
	2. Provide status reports to management	3.5	2.4	2.5
	3. Provide recommendations to management	2.9	2.7	1.7
DUTY G:	**PARTICIPATE IN CAREER DEVELOPMENT ACTIVITIES**			
TASKS:	1. Maintain departmental standards	4.1	3.8	2.4
	2. Participate in training programs	4.1	2.0	1.6
	3. Attend informational meetings	3.9	2.5	0.6
	4. Implement billing procedure changes	4.3	2.2	2.6
	*5. Provide on-the-job training (as needed)	3.5	2.4	2.3

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY H: MAINTAIN WORK AREA			
TASKS: 1. Organize daily work schedule	4.5	4.9	1.7
2. Maintain supply of company forms (N/A)	3.5	3.6	0.8
3. Organize office supplies (as needed & N/A)	2.8	3.8	0.8
4. Maintain working files	3.8	4.1	1.7
5. Ensure data security	4.7	4.9	1.7
6. Follow operational procedures for office equipment	4.1	4.4	1.2
7. Maintain time records	3.8	3.1	1.7

JOB COMPETENCIES	IMPORTANCE
KNOWLEDGE:	
1. English grammer	4.2
2. Corporate policies	4.0
3. Product/service	4.0
4. Pricing	4.0
ATTITUDES/TRAITS:	
1. Detail-oriented	3.8
2. Common sense	4.3
3. Congeniality	4.0
4. Cooperative	4.2
5. Dependable/reliable	4.6
6. Ability to worker under pressure	4.5
7. Good organization	4.5
SKILLS:	
1. Good arithmetic	3.4
2. Problem solving skills	4.4
3. Light typing (35 wpm)	2.5
4. Oral and written communication	4.1
5. Decision-making	4.3
6. Filing	3.0

EQUIPMENT USED:

1. Calculators
2. Computer terminals
3. Copiers
4. Microfiche readers
5. Fax/telecopier
6. Printers
7. Telephone systems
8. Typewriters

DACUM PANELISTS:

Romelle Burns
Xerox Corporation

Barbara Chilton
Xerox Corporation

Maryanne Ivy
Burrell Advertising, Inc.

Loriann Lee
J. Walter Thompson

Kim Levato
Anchor HMO

Sunday C. Mollica
Illinois Bell

Edward S. Piatt
Central Management Services

SURVEY PARTICIPANTS:

Mary Babler
Xerox Corporation

Lindsey Bates
Xerox Corporation

Laura Beaver
Xerox Corporation

Bruce Bloom
Xerox Corporation

Romelle Burns
Xerox Corporation

Barbara Chilton
Xerox Corporation

Darlene Czelcela
Xerox Corporation

Laurie Golden
Xerox Corporation

Maryann Harkess
Xerox Corporation

Rose Henin
Central Management Services

Maryanne Ivy
Burrell Advertising, Inc.

Sunday C. Mollica
Illinois Bell

Lyn Meyer
Xerox Corporation

Edward S. Piatt
Central Management Services

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
DUTY A: PERFORM BILLING FUNCTIONS	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Review billing schedule	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Access customer account	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Update customer account information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Review customer order for accuracy	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Determine product/service charges	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Determine appropriate taxes	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Determine overhead/other fees	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
8. Determine discounts	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
9. Generate billing documents	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
10. Assemble/distribute billing documents	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
11. Report billing activity	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
12. Reconcile accounts	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
13. Assist auditors	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

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Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

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Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY B: ESTABLISH NEW BILLING FILES																		
1. Verify credit approval	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Assign customer number	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Input billing data	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Distribute "new customer" information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY C: RESOLVE BILLING PROBLEMS																		
1. Research customer inquiry	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Notify appropriate departments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Verify problem resolution	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Issue billing adjustments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Follow-up with customer	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

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Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
DUTY D: COMMUNICATE WITH CUSTOMERS	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Receive calls/inquiries	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Provide billing information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Document inquiries requiring follow-up	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Respond to correspondence	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Refer customer inquiries to appropriate department	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY E: COORDINATE DISTRIBUTION (OF PRODUCT OR SERVICE) FUNCTIONS																		
1. Verify delivery	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Installation	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Determine distribution/ shipping costs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Determine installation costs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Issue back order notification	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

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Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY F: PROVIDE INTER-DEPARTMENTAL COMMUNICATIONS																		
1. Answer questions from other departments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Provide status reports to management	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Provide recommendations to management	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY G: PARTICIPATE IN CAREER DEVELOPMENT ACTIVITIES																		
1. Maintain departmental standards	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Participate in training programs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Attend informational meetings	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Implement billing procedure changes	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Provide on-the-job training	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements

DUTY H: MAINTAIN WORK AREA

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Organize daily work schedule	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Maintain supply of company forms	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Organize office supplies	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Maintain working files	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Ensure data security	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Follow operational procedures for office equipment	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Maintain time records	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
SKILLS:						
1. Good arithmetic	5	4	3	2	1	0
2. Problem solving skills	5	4	3	2	1	0
3. Light typing (35 wpm)	5	4	3	2	1	0
4. Oral and written communication	5	4	3	2	1	0
5. Decision-making	5	4	3	2	1	0
6. Filing	5	4	3	2	1	0
KNOWLEDGE:						
1. English grammar	5	4	3	2	1	0
2. Corporate policies	5	4	3	2	1	0
3. Product/service	5	4	3	2	1	0
4. Pricing	5	4	3	2	1	0
	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES ATTITUDES/TRAITS:	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
1. Detail-oriented	5	4	3	2	1	0
2. Common-sense	5	4	3	2	1	0
3. Congeniality	5	4	3	2	1	0
4. Cooperative	5	4	3	2	1	0
5. Dependable/reliable	5	4	3	2	1	0
6. Ability to work under pressure	5	4	3	2	1	0
7. Good organization	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0

NATIONAL ALLIANCE OF BUSINESS
DACUM TASK ANALYSIS AND SURVEY VERIFICATION
OCCUPATION: SHIPPING AND RECEIVING CLERK
SEPTEMBER 15-16, 1987

DESCRIPTION: Shipping and receiving clerks keep records and prepare merchandise for storage or shipment. Shipping clerks pack, weigh, label and dispatch articles, ensuring that shipments comply with purchase orders. They determine shipment methods and may also direct loading of items to be shipped. Receiving clerks, in addition to keeping records, may unpack items and route them to final destinations in the plant or warehouse.

RELATED TITLES:

1. Materials Handling Processor
2. Merchandise Expeditor
3. Stock Handler

* Denotes advance tasks, not required for entry level employees.

	TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY A:	**RECEIVE MERCHANDISE**			
TASKS:	1. Verify delivery receipts	4.8	5.0	2.5
	2. Inspect condition/quantity of delivered goods	5.0	5.0	2.8
	3. Accept or refuse delivery	4.7	5.0	3.3
	4. Unload merchandise	4.8	5.0	2.5
	5. Check purchase order	4.7	5.0	3.4
	6. Record receipt of shipment	4.7	5.0	3.4
DUTY B:	**MAINTAINING RECORDS**			
TASKS:	1. File shipping and receiving documents	4.3	4.5	2.8
	2. Price merchandise	1.8	1.5	1.4
	3. Apply sensor tags when needed	0.6	0.8	1.2
	4. Apply inventory tags	3.0	3.6	2.5
	*5. Assist management with audits	3.6	1.7	2.6
DUTY C:	**INTERNAL DISTRIBUTION OF MERCHANDISE**			
TASKS:	1. Separate goods for routing	4.2	5.0	2.5
	2. Generate move ticket	4.2	4.8	2.8
	3. Deliver merchandise	4.2	5.0	2.6
	4. Deliver mail	3.3	4.2	2.0

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY D: INTERNAL RECEIVING OF MERCHANDISE			
TASKS: 1. Receive/process merchandise from departments for returns	4.2	4.5	2.8
2. Receive/process merchandise/items for storage	4.6	4.3	3.2
3. Receive/process merchandise/items for repair	2.2	2.3	2.0
4. Receive/process items for disposal	4.0	4.2	2.2
DUTY E: SHIPPING MERCHANDISE			
TASKS: 1. Verify shipping merchandise	5.0	5.0	3.7
2. Pack merchandise	4.6	5.0	3.0
3. Weigh merchandise	2.8	2.6	2.2
4. Determine value	3.6	3.3	2.3
5. Determine most economical way to ship	3.3	1.8	2.2
6. Calculate charges	2.5	1.6	1.4
7. Attach shipping label	4.2	4.6	2.7
8. Contact transportation agent	3.6	4.3	2.3
9. Complete shipping records	4.6	4.8	3.0
DUTY F: INVENTORY CONTROL			
TASKS: 1. Rotate stock	3.3	3.7	2.6
2. Notify purchasing of low stock situations	4.5	3.8	2.4
3. Conduct inventory of storage area	2.8	3.2	2.4
4. Notify management of location changes	3.3	3.5	3.4
DUTY G: SPECIAL HANDLING			
TASKS: 1. Identify special handling needs	4.5	4.5	2.8
2. Utilize special packing procedures	4.5	4.5	3.0
3. Utilize special labeling procedures	4.5	4.5	3.0
4. Utilize special storage procedures	4.7	4.3	2.8
5. Utilize special shipping procedures	4.7	4.3	3.0
6. Utilize special security procedures	4.5	4.7	2.7

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY H: COMMUNICATIONS			
TASKS: 1. Process incoming calls	4.5	5.0	3.7
2. Handle complaints	4.7	4.5	3.5
3. Practice telephone etiquette	5.0	5.0	3.3
4. Provide delivery instructions to truck drivers	3.5	4.5	2.5
5. Notify department of goods received	4.3	4.2	2.5
6. Notify supervisor of damaged goods	4.5	4.5	3.3
DUTY I: TRAINING AND DEVELOPMENT			
TASKS: 1. Attend training programs	3.5	1.2	1.8
2. Practice company policies	5.0	5.0	2.7
3. Provide on-the-job training	4.5	3.5	2.8
4. Conduct specialized training	3.7	2.5	3.0
5. Provide recommendations to management	4.3	2.7	1.5
DUTY J: MAINTAINING WORK AREA			
TASKS: 1. Perform routine maintenance	4.5	4.7	2.5
2. Observe company safety rules	5.0	5.0	2.9
3. Notify supervisor of equipment failure	4.8	4.2	2.3

JOB COMPETENCIES	IMPORTANCE
KNOWLEDGE:	
1. Basic computer operation	4.7
2. Basic warehousing	4.2
3. Materials handling equipment operations	4.2

JOB COMPETENCIES	IMPORTANCE
ATTITUDES/TRAITS:	
1. Integrity	5.0
2. Good physical condition	4.3
3. Common sense	5.0
4. Presentable appearance	4.0
5. Dependability	5.0
6. Flexibility	4.5
7. Punctuality	4.8
8. Ability to interact with co-workers	4.0
9. Work independently	4.8
SKILLS:	
1. High school reading skills	5.0
2. Basic arithmetic skills	5.0
3. Legible handwriting	4.8
4. Oral and written communication skills	4.8
SAFETY:	
1. Proper dress	4.5
2. Special protective wear	4.2
3. Equipment operation precautions	4.7

DACUM PANELISTS:

Lawrence Dillion
Central Management Services

Daniel Freitag
Chicago City-Wide Colleges

Robert Wolak
R.R. Donnelley & Sons

Patricia Dunczyk
Montgomery Wards

Allen Triplett
First National Bank of Chicago

SURVEY PARTICIPANTS:

Clarence Banks
R.R. Donnelley & Sons

Daniel Freitag
Chicago City-Wide Colleges

Allen Triplett
First National Bank of Chicago

Al Eisman
First National Bank of Chicago

Frank Mola
First National Bank of Chicago

Robert Wolak
R.R. Donnelley & Sons

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY A: RECEIVING MERCHANDISE																		
1. Verify delivery receipts	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Inspect condition/quantity of delivered goods	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Accept or refuse delivery	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Unload merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Check purchase order	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Record receipt of shipment	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY B: MAINTAINING RECORDS																		
1. File shipping/receiving documents	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Price merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Apply sensor tags when needed	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Apply inventory tags	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Assist management with audits	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY C: INTERNAL DISTRIBUTION OF MERCHANDISE																		
1. Separate goods for routing	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Generate move ticket	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Deliver merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Deliver mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY D: INTERNAL RECEIVING OF MERCHANDISE																		
1. Receive/process merchandise from depts. for returns	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Receive/process merchandise/ other items for storage	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Receive/process merchandise/ items for repair	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Receive/process items for disposal	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements

DUTY E: SHIPPING MERCHANDISE	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Verify shipping merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Pack merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Weigh merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Determine value	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Determine most economical way to ship	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Calculate charges	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Attach shipping label	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
8. Contact transportation agent	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
9. Complete shipping records	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

SHIPPING & RECEIVING CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY F: INVENTORY CONTROL																		
1. Rotate stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Notify purchasing of low stock situations	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Conduct inventory of storage area	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Notify management of location changes	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY G: SPECIAL HANDLING																		
1. Identify special handling needs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Utilize special packing procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Utilize special labeling procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Utilize special storage procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Utilize special shipping procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Utilize special security procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY H: COMMUNICATIONS																		
1. Process incoming calls	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Handle complaints	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Practice telephone etiquett	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Provide delivery instructions to truck drivers	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Notify department of goods received	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Notify supervisor of damaged goods	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY I: TRAINING AND DEVELOPMENT																		
1. Attend training programs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Practice company policies	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Provide on-the-job training	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Conduct specialized training	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Provide recommendations to management	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements DUTY J: MAINTAINING WORK AREA	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Perform routine maintenance	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Observe company safety rules	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Notify supervisor of equipment failure	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

SHIPPING AND RECEIVING CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
KNOWLEDGE:						
1. Basic computer operation	5	4	3	2	1	0
2. Basic warehousing	5	4	3	2	1	0
3. Materials handling equipment operations	5	4	3	2	1	0
	5	4	3	2	1	0
ATTITUDES/TRAITS:						
1. Integrity	5	4	3	2	1	0
2. Good physical condition	5	4	3	2	1	0
3. Common sense	5	4	3	2	1	0
4. Presentable appearance	5	4	3	2	1	0
5. Dependability	5	4	3	2	1	0
6. Flexibility	5	4	3	2	1	0
7. Punctuality	5	4	3	2	1	0
(continued next page)	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
ATTITUDES/TRAITS: (cont.)						
8. Ability to interact with co-workers	5	4	3	2	1	0
9. Work independently	5	4	3	2	1	0
	5	4	3	2	1	0
SKILLS:						
1. High school reading skills	5	4	3	2	1	0
2. Basic arithmetic skills	5	4	3	2	1	0
3. Legible handwriting	5	4	3	2	1	0
4. Oral and written communication skills	5	4	3	2	1	0
	5	4	3	2	1	0
SAFETY:						
1. Proper dress	5	4	3	2	1	0
2. Special protective wear	5	4	3	2	1	0
3. Equipment operation precautions	5	4	3	2	1	0

NATIONAL ALLIANCE OF BUSINESS
DACUM TASK ANALYSIS AND SURVEY VERIFICATION
OCCUPATION: GENERAL OFFICE CLERK
SEPTEMBER 9-10, 1987

DESCRIPTION: Performs secretarial activities in an office environment. Produces any combination of the following and similiar clerical tasks requiring limited knowledge of systems or procedures: writes or types bills, statements, receipts, checks, or other documents; copying information from one record to another; proofreads records or forms; counts, weighs or measures materials; sorts and files records; receives money from customers and deposits money in bank; addresses envelops or packages by hand or with envelop stuffing machine; answers telephone, conveys messages, and runs errands; stamps, sorts, and distributes mail; stamps or numbers forms by hand or machine and copies documents using office duplicating equipment.

RELATED TITLES:

1. Senior Clerk
2. Senior Clerk-Typist
3. Requisition Clerk
4. Processor
5. Control Clerk
6. Accounting Clerk
7. Inquiry Clerk
8. Payroll Clerk

	TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY A:	**ANSWER TELEPHONE**			
TASKS:	1. Demonstrate proper telephone etiquette	4.2	4.9	2.5
	2. Direct calls	3.8	4.6	2.3
	3. Screen calls	3.2	4.1	2.0
	4. Take messages	4.4	4.9	2.2
DUTY B:	**OPERATE OFFICE MACHINES**			
TASKS:	1. Operate electronic typewriter	4.2	4.6	4.0
	2. Perform basic computer operations	3.0	2.8	3.8
	3. Operate 10-key adding machine or calculator	2.9	2.7	3.1
	4. Operate photocopier	3.8	4.6	1.8
DUTY C:	**GREET INDIVIDUALS**			
TASKS:	1. Create a congenial atmosphere	4.1	4.1	1.7
	2. Identify purpose of visit	3.6	3.8	1.7
	3. Provide information needed	3.9	4.3	2.3
	4. Notify appropriate individual	3.9	3.8	1.8

	TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY D:	**HANDLE IN-COMING AND OUT-GOING MAIL**			
TASKS:	1. Sort and distribute mail	3.2	4.1	2.2
	2. Log mail	2.2	2.4	1.5
	3. Direct unidentified mail	2.9	3.4	1.7
	4. Identify method of mailing	2.6	3.2	1.4
	5. Process out-going mail	3.5	4.1	1.6
DUTY E:	**MAINTAIN FILES**			
TASKS:	1. Identify the filing system	4.6	4.2	3.0
	2. Make file folders	3.8	2.4	2.0
	3. Sort documents	4.0	4.2	2.3
	4. Retrieve files	4.0	3.9	2.2
	5. Purge the files	3.4	1.3	2.1
DUTY F:	**ADDRESS COMPLAINTS**			
TASKS:	1. Prioritize the complaints	3.6	3.8	2.5
	2. Handle the complaint, if possible	3.6	3.8	2.4
	3. Direct complaint to appropriate unit/person	4.1	4.3	2.2
DUTY G:	**MAINTAIN FINANCIAL ACCOUNTS**			
TASKS:	1. Prepare vouchers/invoices and billing statements	2.9	2.2	2.2
	2. Prepare checks or check requisitions	2.5	1.7	2.3
	3. Maintain petty cash	2.2	1.6	1.7

JOB COMPETENCIES	IMPORTANCE
KNOWLEDGE:	
1. Knowing company policy and procedures	4.4
2. Familiarity with computer/word processor operations	3.7
3. Completion of application forms	3.8
4. Knowledge of mailing methods	3.3
5. Knowledge of debits and credits	2.6
6. Knowledge of six basic telephone systems	2.9
ATTITUDES/TRAITS:	
1. Pleasant personality	4.6
2. Asking questions	4.3
3. Patience	4.6
4. Honesty	4.6
5. Willing to accept extra responsibility	4.3
6. Initiative	4.0
7. Able to develop a good rapport	4.2
8. Maintain confidentiality	4.2
9. Dependability	4.4
10. Consideration	4.1
11. Judgement decisions	4.1
12. Team player	3.9
13. Flexibility with time schedule	3.5
14. Good listening skills	4.2
15. Problem-solving	4.4
16. Interpersonal skills	4.3

JOB COMPETENCIES	IMPORTANCE
SKILLS:	
1. (Composition)	5.0
2. Oral communication	4.6
3. Good standard English skills (written and oral)	4.9
4. Telephone manners	4.6
5. Telephone operation	3.8
6. (Dictation)	5.0
7. (Editing material)	5.0
8. Follow directions (written and oral)	4.9
9. Thorough (attention to detail)	4.9
10. Organize workspace	3.5
11. Operate 10-key adding machine by touch	2.2
12. Organizational skills	4.3
13. Type 40-50 wpm net	3.9
14. Familiar with photocopier operations	3.6
15. Basic general business math	3.7
- checks	2.4
- maintain ledger	2.2
- budgets/tax forms	2.0
- balancing	2.6
16. Basic math calculations	4.1
- addition	4.2
- subtraction	4.2
- multiplication	4.1
- division	3.9
- fractions	3.5
- percentages	3.6
- decimals	3.3
17. Time management	3.6
18. Attendance (0 in the first 6 months, 2 episodes per year and punctuality 5 minutes early, 2 times for non-extraordinary)	3.7
19. Able to file:	4.6
- alphabetically	4.6
- numerically	4.0
- chronologically	3.9
20. Meet company dress code	4.1

DACUM PANELISTS:

Karen Bell
Carson Pirie Scott & Company

Carol Embry
Mount Sinai Hospital

Joanne Jackson
Chicago Marriott Hotel

Gail Jamison
Chemical Card Corp.

Linda Lovejoy
Continental Bank

Laura Mileusnich
USG Corporation

Senti Ratcliff
Metropolitan Sanitary District

Janet Rapp
Central Management Services

Dorace Steppes
First National Bank of Chicago

Bridget Swider
Citicorp Savings of Illinois

SURVEY PARTICIPANTS:

Jeanette Cozzi
Chicago Marriott Hotel

Carolyn Day
Metropolitan Sanitary District

Carol Embry
Mount Sinai Hospital

Gail Jamison
Chemical Card Corp.

Velma Jenning
Chicago Marriott O'Hare

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Chicago Marriot Corporation

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USG Corporation

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Chemical Card Corporation

Daisy A. Parayno
USG Corporation

Celestine Patterson
Mount Sinai Hospital

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Central Management Services

Senti Ratcliff
Metropolitan Sanitary District

Dominic Smith
Metropolitan Sanitary District

Olga Swiguez
Central Management Services

Dorace Steppes
First National Bank of Chicago

Edgar Tilley
Central Management Services

Ethel Weston
Central Management Services

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctiy?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY A: ANSWER TELEPHONES																		
1. Demonstrate proper telephone etiquette	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Direct calls	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Screen calls	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Take messages	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY B: OPERATE OFFICE MACHINES																		
1. Operate electronic typewriter	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Perform basic computer operations	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Operate 10-key adding machine or calculator	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Operate photocopier	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY C: GREET INDIVIDUALS																		
1. Create a congenial atmosphere	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Identify purpose of visit	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Provide information needed	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Notify appropriate individual	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY D: HAND IN-COMING AND OUT-GOING MAIL																		
1. Sort/distribute mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Log mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Direct unidentified mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Identify method of mailing	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Process out-going mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY E: MAINTAIN FILES																		
1. Identify the filing system	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Make file folders	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Sort documents	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Retrieve files	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Purge the files	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY F: ADDRESS COMPLAINTS																		
1. Prioritize the complaint	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Handle the complaint (if possible)	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Direct complaint to appropriate unit/person	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements

DUTY G: MAINTAIN FINANCIAL ACCOUNTS

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Prepare vouchers/invoices and billing statements	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Prepare checks or check requisitions	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Maintain petty cash	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
KNOWLEDGE:						
1. Knowing company policy and procedures	5	4	3	2	1	0
2. Familarity with computer, word processor operations	5	4	3	2	1	0
3. Completion of application forms	5	4	3	2	1	0
4. Knowledge of mailing methods	5	4	3	2	1	0
5. Knowledge of debits and credits	5	4	3	2	1	0
6. Knowledge of six basic telephone systems	5	4	3	2	1	0
SKILLS:						
1. Oral communication	5	4	3	2	1	0
2. Good standard English skills (written and oral)	5	4	3	2	1	0
3. Telephone manners	5	4	3	2	1	0
4. Telephone operation	5	4	3	2	1	0
(continued next page)						

GENE OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES SKILLS: (cont.)	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
5. Follow directions (written and oral)	5	4	3	2	1	0
6. Thorough - (attention to detail)	5	4	3	2	1	0
7. Organize work-space	5	4	3	2	1	0
8. Operate 10-key adding machine by touch	5	4	3	2	1	0
9. Organizational skills	5	4	3	2	1	0
10. Type 40-50 WPM net	5	4	3	2	1	0
11. Familiar with photocopier operations	5	4	3	2	1	0
12. Basic general business math	5	4	3	2	1	0
- checks	5	4	3	2	1	0
- maintain ledger	5	4	3	2	1	0
- budgets/tax forms	5	4	3	2	1	0
- balancing	5	4	3	2	1	0

(continued next page)

GE[illegible] OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES SKILLS: (cont.)	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
13. Basic math calculations	5	4	3	2	1	0
- addition	5	4	3	2	1	0
- subtraction	5	4	3	2	1	0
- multiplication	5	4	3	2	1	0
- division	5	4	3	2	1	0
- fractions	5	4	3	2	1	0
- percentages	5	4	3	2	1	0
- decimals	5	4	3	2	1	0
11. Time management	5	4	3	2	1	0
15. Attendance (0 in the first 6 months, 2 episodes/year and Punctuality (5 minutes early, 2 times for non-extraordinary)	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
SKILLS: (cont.)						
16. Able to file:	5	4	3	2	1	0
- alphabetically	5	4	3	2	1	0
- numberically	5	4	3	2	1	0
- chronologically	5	4	3	2	1	0
17. Meet company dress code	5	4	3	2	1	0
	5	4	3	2	1	0
ATTITUDES/TRAITS:						
1. Pleasant personality	5	4	3	2	1	0
2. Asking questions	5	4	3	2	1	0
3. Patience	5	4	3	2	1	0
4. Honesty	5	4	3	2	1	0
5. Willing to accept extra responsibility	5	4	3	2	1	0
(continuted next page)	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES ATTITUDES/TRAITS: (cont.)	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
6. Initiative	5	4	3	2	1	0
7. Able to develop a good rapport	5	4	3	2	1	0
8. Maintain confidentiality	5	4	3	2	1	0
9. Dependability	5	4	3	2	1	0
10. Consideration	5	4	3	2	1	0
11. Judgement decisions	5	4	3	2	1	0
12. Team player	5	4	3	2	1	0
13. Flexibility with time schedule	5	4	3	2	1	0
14. Good listening skills	5	4	3	2	1	0
15. Problem - solving	5	4	3	2	1	0
16. Interpersonal skills	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
SEPTEMBER 10, 1987

ACCOUNTING CLERK

(All references to manual procedures can be performed electronically)
(* Denotes entry level skills)

DUTY A: Recording Entries in Journals and Ledgers

TASKS:
- *1. Record accounting entries for buying merchandise on account using manual bookkeeping system
- *2. Record accounting entries for cash payments using manual bookkeeping system
- *3. Record accounting entries for selling merchandise on account using manual bookkeeping system
- *4. Record cash receipts accounting entries using manual bookkeeping system
- *5. Post from cash journals using manual bookkeeping system
- *6. Record sales tax accounting entries using manual bookkeeping system
- 7. Record accounting entries using peg board
- *8. Record accounting entries in a combination journal using manual bookkeeping system
- *9. Record accounting entries pertaining to notes and interest using manual bookkeeping system
- *10. Record accounting entries pertaining to accrued interest income using manual bookkeeping system
- *11. Record accounting entries pertaining to accrued interest expense using manual bookkeeping system
- *12. Record accounting entries pertaining to payroll using manual bookkeeping system
- *13. Record payroll tax accounting entries using manual bookkeeping system
- 14. Record accounting entries pertaining to corporation income taxes using manual bookkeeping system
- *15. Record accounting entries to adjust an account using a manual bookkeeping system
- *16. Post directly to ledger from source document using manual bookkeeping system
- *17. Post to ledger account from journals using manual bookkeeping system
- *18. Correct errors indicated by trial balance
- *19. Write receipts for checks and cash sales

DUTY B: Accomplishing Periodic Accounting/Reporting Activities

TASKS:
1. Record opening entries for new business using manual bookkeeping system
*2. Foot, prove and rule journals
*3. Record closing journal entries using manual bookkeeping system
*4. Prepare customer's statement of accounts
*5. Prepare invoices for payments due
6. Record and verify inventory
*7. Type periodic reports and statements
*8. Prepare checks to pay bills for business
9. Prepare post-closing trial balance using a calculator
10. Prepare income statement using calculator
11. Prepare capital statements using a calculator
12. Prepare balance sheet using a calculator
13. Prepare schedule of accounts payable using calculator
14. Prepare schedule of accounts receivable using calculator
15. Prepare schedule of cost of goods sold using calculator
*16. Analyze and verify ledger accounts

DUTY C: Accomplishing General Accounting/Banking Related Activities

TASKS:
1. Process accounts payable invoices in manual bookkeeping system
2. Record discounts allowable on invoices
3. Record daily sales on unit control forms
4. Prepare credit memos for goods returned
5. Reconcile statements using calculator
6. Process returned checks
7. Fill out purchase orders
8. Prepare invoices
9. Prepare accounting data for computer processing
10. Prepare reconciliation correction sheets for changes to computer generated reports

DUTY D: Accomplishing Payroll Activities

TASKS:
*1. Prepare payroll using manual payroll system
*2. Process salary adjustments manually
*3. Prepare individual employee's earnings record manually
4. Prepare commission statements manually
*5. Prepare payroll statements manually
6. Prepare employee's form W-2 manually

7. Prepare employer's quarterly federal tax returns manually (form 941)
8. Prepare federal tax deposits
9. Prepare employer's quarterly state tax returns manually
10. Prepare state tax deposits
11. Prepare employer's annual reconciliation reports of income tax withheld manually (form W-3)
12. Prepare employer's federal unemployment tax report manually (form 940)
13. Prepare state unemployment tax report manually
14. Prepare FICA tax reports manually
*15. Post payroll deductions using manual bookkeeping system

DUTY E: Maintaining Office Equipment

TASKS:
*1. Replace paper and ribbons on office machines
*2. Clean equipment
*3. Perform maintenance functions on photocopier such as changing toner and replacing paper
*4. Change paper tapes on calculators or adding machines
*5. Repair minor office equipment malfunctions
*6. Recommend service on equipment

DUTY F: Performing Clerical Activities

TASKS:
1. Duplicate materials using photocopying machine
2. Process outgoing mail
3. Process incoming mail
*4. Set up new files
*5. File materials using alphabetic filing system
*6. File materials using numeric filing system
*7. File materials using subject filing system
*8. Verify calculations on source document using calculator
*9. Process incoming telephone calls
*10. Process outgoing telephone calls
11. Clean and straighten up work area
12. Equip work station with office supplies and office forms
13. Record outgoing long distance telephone calls
*14. Prioritize work

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Lucy Jones
Electro-Motive Div./G.M.

Gina Loiacono
FMC Corporation

Theresa McWilliams
Chicago City Wide College

Genita Robinson
Penny's Real Estate

Loretta Thomas
Beverly Bank

Vernon Woods

DUTY A: Recording Entries in Journals and Ledgers

TASKS:
1 Record accounting entries for buying merchandise on account using manual bookkeeping system
2 Record accounting entries for cash payments using manual bookkeeping system
3 Record accounting entries for selling merchandise on account using manual bookkeeping system
4 Record cash receipts accounting entries using manual bookkeeping system
5 Post from cash journals using manual bookkeeping system
6 Record sales tax accounting entries using manual bookkeeping system
7 Record accounting entries using peg board
8 Record accounting entries in a combination journal using manual bookkeeping system
9 Record accounting entries pertaining to notes and interest using manual bookkeeping system
10 Record accounting entries pertaining to accrued interest income using manual bookkeeping system
11 Record accounting entries pertaining to accrued interest expense using manual bookkeeping system
12 Record accounting entries pertaining to payroll using manual bookkeeping system
13 Record payroll tax accounting entries using manual bookkeeping system
14 Record accounting entries pertaining to corporation income tax using manual bookkeeping system
15 Record accounting entries to adjust an account using a manual bookkeeping system
16 Post directly to ledger from source document using manual bookkeeping system
17 Post to ledger account from journals using manual bookkeeping system
18 Correct errors indicated by trial balance
19 Write receipts for checks and cash sales

DUTY B: Accomplishing Periodic Accounting/Reporting Activities

TASKS:
1 Record opening entries for new business using manual bookkeeping system
2 Foot, prove and rule cash journals
3 Record closing journal entries using manual bookkeeping system
4 Prepare customer's statement of accounts
5 Prepare invoices for payments due
6 Take inventory
7 Type periodic reports and statements
8 Write checks to pay bills for business
9 Prepare post-closing trial balance using a calculator
10 Prepare income statement using calculator
11 Prepare capital statements using calculator
12 Prepare balance sheet using calculator
13 Prepare schedule of accounts payable using calculator
14 Prepare schedule of accounts receivable using calculator

15 Prepare schedule of cost of goods sold using calculator

DUTY C: Accomplishing General Accounting/Banking Related Activities

TASKS:
1 Process accounts payable invoices in manual bookkeeping system
2 Record discounts allowable on invoices
3 Record daily sales on unit control forms
4 Prepare credit memos for goods returned
5 Reconcile bank statements using calculator
6 Process returned checks
7 Fill out purchase order invoices
8 Prepare bill of sale
9 Prepare accounting data for computer processing
10 Prepare reconciliation correction sheets for changes to computer generated reports

DUTY D: Accomplishing Payroll Activities

TASKS:
1 Post payroll deductions using manual bookkeeping system
2 Prepare individual employee's earnings record manually
3 Prepare salesperson's commission statements manually
4 Process salary adjustments manually

DUTY E: Maintaining Office Equipment

TASKS:
1 Change office equipment ribbons
2 Clean equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Change paper tapes on calculators or adding machines
5 Repair minor office equipment malfunctions
6 Recommend service on equipment
7 Replace paper and ribbons on office machines

DUTY F: Performing Clerical Activities

TASKS:
1 Duplicate materials using photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Set up new files
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 File materials using subject filing system
8 Verify calculations on source documents using calculator
9 Process incoming telephone calls
10 Process outgoing telephone calls
11 Clean and straighten up work area
12 Equip work station with office supplies and office forms
13 Record outgoing long distance telephone calls
14 Prioritize work

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
SEPTEMBER 21, 1987

TYPIST/WORD PROCESSOR

(* Denotes entry level skills)

DUTY A: Typewriting/Inputting

TASKS:
- *1 Type/key from longhand or edited rough draft copy
- *2 Type/key letters
- *3 Type/key memos
- *4 Type/key tables
- *5 Type/key manuscripts
- *6 Type/key technical reports
- *7 Type/key special pages for manuscripts or reports such as cover page, table of contents or bibliography
- *8 Type/key outlines
- *9 Type/key information on cards such as postal cards, index cards, file cards or address-finder cards
- *10 Type/key labels such as address labels, file folder labels or file drawer labels
- 11 Transcribe dictation from recorded media
- *12 Maintain all hard copy files and records
- *13 Type/key forms
- 14 Input data using optical character recognition equipment

DUTY B: Performing Telecommunications Activities

TASKS:
- *1 Process incoming telephone calls
- *2 Process outgoing telephone calls
- *3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
- 4 Maintain telephone listings on computer or word processor
- *5 Take messages and get them to correct employee
- 6 Record outgoing long distance telephone calls

DUTY C: Maintaining Office Equipment

TASKS:
- *1 Change office equipment ribbons, printwheels, and fonts
- *2 Clean office equipment
- 3 Perform maintenance functions on photocopier such as changing toner and replacing paper
- 4 Repair minor office equipment malfunctions
- 5 Recommend service on office equipment
- *6 Load/change paper in printer
- 7 Record operating and down time

DUTY D: Performing Clerical Activities

TASKS:
*1 Duplicate materials on photocopying machine
*2 Collate and bind documents
3 Verify calculations made by others
*4 Clean and straighten up work area
5 Equip desk with office supplies and office forms
6 Resolve user problems
7 Prepare worker production log
8 Process incoming/outgoing mail
*9 Follow procedures to maintain confidentiality of data
10 Maintain system access security

DUTY E: Filing Materials Manually

TASKS:
*1 Code materials for filing
*2 Sort materials for alphabetic filing
*3 Sort materials for numeric filing
*4 Sort materials for subject filing
*5 File materials using alphabetic filing
*6 File materials using numeric filing
*7 File materials using subject filing
*8 Retrieve materials from files
9 Retrieve materials stored on microfilm or microfiche
*10 Locate misfiles
11 Transfer materials to inactive files
12 Purge files
13 Secure classified or confidential materials

DUTY F: Organizing and Planning

TASKS:
*1 Prioritize work

DUTY G: Inputting and Storing Documents and Files

TASKS:
*1 Initialize diskettes and other magnetic media
2 Input data into spreadsheet formats
3 Input data into graphs and charts
*4 Input records into data base files
*5 Prepare backup files
6 Create glossary file
7 Update spelling dictionary
*8 Store documents on diskettes and other magnetic media
*9 Retrieve documents from diskette and other magnetic media
*10 Maintain diskette files and other magnetic media
11 Input data using optical character recognition equipment
12 Create merge document

DUTY H: Editing and Correcting Documents, Records and Files

TASKS:
*1 Proofread documents for format, content and typographical errors
*2 Move (rearrange) text
*3 Search and replace text
*4 Insert/delete text
5 Rename files
*6 Insert end-of-line hyphens into text
*7 Prepare new document from existing documents
*8 Update existing records in files
9 Update data on spreadsheets
10 Delete files or records from storage
*11 Copy one diskette to another
12 Maintain backup files
13 Process text and data using integrated software
14 Assemble documents from stored text

DUTY I: Printing, Distributing, and Receiving Output

TASKS:
*1 Print documents or reports
*2 Print information according to specific criteria
3 Transmit documents or reports via modem
4 Receive documents or reports via modem
*5 Print mailing labels or envelopes
6 Transmit communications using electronic bulletin board or electronic mail
7 Monitor electronic bulletin board or electric mail
8 Print documents by interfacing word processing equipment with phototypesetting equipment
*9 Sort completed jobs for distribution

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Janice Eckland
FMC Corporation

Roberta Brassel-Jones
R.R. Donnelley & Sons Company

Malinda J. Kimble
Inland Steel Industries, Inc.

Derrick Moore
Vicki L. Hudson & Company

Rose D. Weeden
City of Chicago, Dept. of Police

TYPIST

DUTY A: Typewriting

TASKS:
1 Type from longhand or edited rough draft copy
2 Type letters
3 Type memos
4 Type tables
5 Type manuscripts
6 Type technical reports
7 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography
8 Type outlines
9 Type information on cards such as postal cards, index cards, file cards or address-finder cards
10 Type labels such as address labels, file folder labels or file drawer labels
11 Type offset masters
12 Transcribe dictation from recorded media
13 Maintain all hard copy files and records
14 Type forms

DUTY B: Performing Telecommunications Activities

TASKS:
1 Process incoming telephone calls
2 Process outgoing telephone calls
3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
4 Maintain telephone listings on computer or word processor
5 Take messages and get them to correct employee
6 Record outgoing long distance telephone calls

DUTY C: Maintaining Office Equipment

TASKS:
1 Change office equipment ribbons
2 Clean office equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor office equipment malfunctions
5 Recommend service on office equipment

DUTY D: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Collate and bind documents
3 Verify calculations made by others
4 Clean and straighten up work area
5 Equip desk with office supplies and office forms
6 Put up bulletin board display

DUTY E: Filing Materials Manually

TASKS:
1 Code materials for filing
2 Sort materials for alphabetic filing
3 Sort materials for numeric filing
4 Sort materials for subject filing
5 File materials using alphabetic filing
6 File materials using numeric filing
7 File materials using subject filing
8 Retreive materials from files
9 Retreive materials stored on microfilm or microfiche
10 Locate misfiles
11 Transfer materials to inactive files
12 Purge files

DUTY F: Organizing and Planning

TASKS:
1 Prioritize work

DUTY G: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key documents from longhand or edited rough draft
3 Key documents from machine transcription
4 Key mailing labels and envelopes
5 Input data into spreadsheet formats
6 Input data into graphs and charts
7 Input records into data base files
8 Prepare backup files
9 Create glossary file
10 Store repetitive material
11 Update spelling dictionary
12 Store documents on diskettes

DUTY H: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread documents for format, content and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Add new records to files
9 Update existing records in files
10 Update data on spreadsheets
11 Revise stored repetitive material
12 Verify data and correct errors
13 Delete text, files or records from storage
14 Copy one diskette to another
15 Maintain backup files
16 Process text and data using integrated software

17 Assemble documents from stored text

DUTY I: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using single-sheet paper
2 Print information according to sort criteria
3 Transmit documents or reports via modem
4 Receive documents or reports via modem
5 Print mailing labels or envelopes
6 Transmit communications using electronic bulletin board or electronic mail
7 Monitor electronic bulletin board or electric mail

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key correspondence from longhand or edited rough draft
3 Key correspondence from machine transcription
4 Key business reports or manuscripts from longhand or edited rough draft
5 Key business reports or manuscripts from machine transcription
6 Key meeting minutes from longhand or edited rough draft
7 Key meeting minutes from machine transcription
8 Key outlines from longhand or edited rough draft
9 Key outlines from machine transcription
10 Key agenda from longhand or edited rough draft
11 Key agenda from machine transcription
12 Key news release from longhand or edited rough draft
13 Key news release from machine transcription
14 Input data using optical character recognition equipment
15 Input data into spreadsheet formats
16 Input data to prepare graphs and charts
17 Input data into data base files
18 Key mailing labels or envelopes
19 Key tabular information
20 Create backup files
21 Create glossary file
22 Store repetitive material
23 Update spelling dictionary

DUTY B: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread document for content, format and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert and delete text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Update existing records in data base files
9 Update data on spreadsheets
10 Update data on graphs and charts
11 Verify data and correct errors
12 Delete text or data from storage
13 Copy one diskette to another
14 Add data to the backup files
15 Delete data from backup files

DUTY C: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using continuous-feed (fanfold or pinfeed) paper
2 Print documents or reports using single-sheet paper
3 Print documents by interfacing word processing equipment with phototypesetting equipment

4 Print information according to sort criteria
5 Transmit data via modem
6 Receive data via modem
7 Separate continuous-feed forms or paper
8 Sort completed jobs for distribution
9 Print mailing labels or envelopes

DUTY D: Maintaining Office Equipment

TASKS:
1 Change ribbon on word processing unit
2 Repair minor equipment malfunctions
3 Recommend service on equipment
4 Perform maintenance functions on photocopier such as changing toner and replacing paper
5 Clean equipment
6 Change ribbon on printer
7 Change printwheel on printer
8 Load/change paper in printer
9 Report equipment malfunction to supervisor
10 Record operating and down time

DUTY E: Performing Clerical Activities

TASKS:
1 Clean and straighten up work area
2 Verify calculations made by others
3 Equip work station with supplies and forms
4 Duplicate materials on photocopying machine
5 Collate and bind documents
6 Resolve user problems
7 Prepare worker production log
8 Prioritize work
9 Process incoming telephone calls
10 Process outgoing telephone calls
11 Record outgoing long distance telephone calls
12 Process incoming mail
13 Process outgoing mail
14 Maintain mailing list electronically
15 Perform data protection procedures during power failure
16 Perform power conservation and data protection procedures during air conditioning failure
17 Follow procedures to maintain confidentiality of data
18 Maintain system access security

DUTY F: Filing Materials Manually

TASKS:
1 Maintain magnetic media file
2 Maintain software library
3 Maintain non-electronic filing system
4 Secure classified or confidential materials

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
SEPTEMBER 23, 1987

DRAFTER/COMPUTER-AIDED DRAFTER

(* Denotes entry level skills)

Duty A: Planning and Organizing Activities

Tasks:
1 Determine the requirements of a specific drafting job
2 Estimate plan quantity and sizes of drawings
*3 Apply appropriate drafting standards to drawings
*4 Select appropriate drafting techniques for assigned drawings
*5 Maintain drawing files
6 Determine project schedule

Duty B: Researching Information

Tasks:
1 Locate information using manufacturers' catalogs
2 Locate information using appropriate handbooks
3 Locate information using microfilm files
4 Locate information using computer data files
5 Determine appropriate materials and availability
6 Identify appropriate graphic standards
7 Identify appropriate interfacing personnel (Internal/External)

Duty C: Performing General Office Procedures

Tasks:
*1 Maintain rapport with interfacing personnel
2 Participate in project conferences
3 Interpret plans
4 Coordinate work with engineering personnel
5 Coordinate work with shop/field personnel
*6 Coordinate all project drawings
*7 Check plan dimensions
*8 Maintain drafting instruments and equipment
*9 File original working drawings
*10 Maintain and care for CAD work station
*11 Determine and communicate equipment failure

Duty D: Preparing Preliminary Drawings

Tasks:
*1 Draw freehand sketches
*2 Draw isometric sketches
*3 Draw orthographic sketches
*4 Draw sketches perspectives
*5 Draw oblique sketches

*6 Draw schematic sketches
*7 Read and transfer measurements and prepare scale sketches

Duty E: Performing Basic Layouts

Tasks: *1 Work from written instructions to produce drawings
*2 Work from verbal instructions to produce drawings
*3 Perform basic layouts to scale using specified tolerances

Duty F: Preparing Detail Drawings

Tasks: *1 Draw individual parts from drawings layout
*2 Draw individual parts using existing parts drawings
*3 Create assembly drawings
*4 Draw orthographic projections
*5 Draw sectional views
*6 Draw auxiliary views
*7 Draw isometric views
*8 Draw intersection and development drawings
*9 Analyze and add dimensions and tolerances to drawings
10 Apply geometric tolerances to drawings when required
*11 Apply coordinate dimensioning standards to drawings when required
12 Create bill of materials and schedules
*13 Add title block information and borders to drawings
*14 Letter drawings
*15 Add notes to drawings

Duty G: Using Reproduction Techniques

Tasks: 1 Reproduce drawings on print/photographic
2 Create hard copy using a plotter/printer
3 Copy existing drawings using digitizing techniques

Duty H: Performing Presentation Techniques

Tasks: 1 Produce renders
*2 Produce graphs, charts and diagrams
3 Produce project time schedules

Duty I: Producing Architectural Drawings

Tasks: 1 Implement local, state and federal architectural codes
2 Draw presentation floor plans

3 Draw presentation elevation views
4 Draw interior perspective views
*5 Draw exterior perspective views
6 Illustrate landscape features
*7 Sketch preliminary plan layouts
*8 Sketch preliminary elevations
*9 Sketch preliminary sections
*10 Draw scaled floor plans
*11 Draw foundation plans
*12 Draw foundation sections
*13 Reproduce common plan features
*14 Draw exterior elevations
15 Draw framing plans
*16 Draw typical wall sections
17 Draw parapet and roof drawings
*18 Draw stair sections
19 Draw fireplace sections
20 Draw chimney sections
*21 Draw door sections
*22 Draw window sections
23 Draw bathroom sections
24 Draw cabinet sections and details
25 Draw millwork (trim) sections
26 Draw door and window schedules
27 Draw finish schedules
28 Draw floor sections
29 Draw attic sections
30 Draw shaft sections
31 Draw typical closet sections
32 Prepare plumbing plans
33 Prepare HVAC plans
34 Prepare electrical and lighting plans
35 Check architectural drawings

Duty J: Drawing Light Commercial Building Plans

Tasks:
1 Draw commercial building floor plans
2 Draw commercial building foundation plans
3 Draw commercial building framing plans
4 Draw commercial building roof plans
5 Draw commercial building site plans
6 Draw commercial building elevations
7 Draw commercial building section drawings
8 Prepare commercial building door, window and finish schedules
9 Prepare commercial building plumbing plans
10 Prepare commercial building HVAC plans
11 Prepare commercial building electrical plans
12 Prepare commercial building landscape plans
13 Prepare commercial building reflective ceiling plans
14 Dimension commercial building drawings
15 Check commercial building drawings
16 Prepare commercial building material quantity/cost estimates

Duty K: Producing Structural Working Drawings

Tasks:
1 Implement local, state and federal structural codes
2 Draw structural steel plans
3 Dimension structural steel drawings
4 Draw beam connections
5 Construct column detail drawings
6 Construct detail truss drawings for timber
7 Prepare structural foundation and slab plans
8 Prepare structural floor framing plans
9 Prepare structural roof framing plans
10 Draw structural sections and details
11 Draw structural concrete foundation plans
12 Prepare column and beam schedule for structural steel
13 Prepare column and beam schedule for reinforcing steel
14 Prepare bills of materials from structural drawings
15 Check structural drawings

Duty L: Producing Mechanical Working Drawings

Tasks:
*1 Prepare mechanical orthographic assembly drawings
*2 Prepare mechanical orthographic subassembly drawings
3 Detail components of mechanical orthographic assembly drawings
4 Detail components of mechanical orthographic subassembly drawings
5 Prepare mechanical isometric assembly drawings
6 Prepare mechanical isometric subassembly drawings
7 Prepare mechanical isometric exploded view drawings
8 Prepare jig drawings
9 Prepare fixture drawings
*10 Prepare sheet metal development drawings
11 Prepare HVAC equipment and duct drawings
12 Prepare forming die drawings
13 Prepare bills of materials from mechanical drawings
14 Check mechanical drawings

Duty M: Producing Electrical and Electronic Working Drawings

Tasks:
1 Implement local, state and federal electrical codes
2 Draw electrical block diagrams
*3 Draw electrical schematic diagrams
4 Draw electrical connection diagrams
5 Draw electronic block diagrams

6 Draw electronic schematic diagrams
7 Prepare bills of materials from electrical/electronic drawings
8 Draw electronic connection diagrams
*9 Draw industrial controls ladder diagrams
10 Draw electrical power single-line diagrams
11 Check electrical/electronic drawings

Duty N: Producing Civil Engineering Drawings

Tasks:
1 Implement local, state and federal civil engineering codes
2 Produce detailed construction drawings
3 Develop topographical profiles
4 Develop specification sheets for highway construction
5 Develop specification sheets for river and harbor improvements
6 Produce plans for flood control

Duty O: Using CAD Command Processes

Tasks:
*1 Prepare basic CAD drawing
2 Start up, log on, retrieve, save, log off and shut down CAD system
3 Build data base
4 Edit data base
5 Create plotter files
6 Create disk files
7 Copy disk files
8 Execute specialized programs
9 Develop backup files
10 Restore backup files
11 Develop configure/control changes
12 Develop execute lists using command language
13 Write simple FORTRAN program
14 Manipulate files

Duty P: Producing Drawings Using CAD

Tasks:
1 Generate grid on drawing
2 Select appropriate geometric commands
3 Develop three-dimensional drawings
4 Select appropriate line work, weights and color
5 Develop layering techniques and check for consistency

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Robert Brausch
Sargent-Lundy Engineers

Bancherd Chitrarachis
D'Escoto, Inc.

Jessie Espinosa
D'Escoto, Inc.

Ray Karenas
Castle Engineering Co.

Steve Pissarreth
Barnes & Reinecke, Inc.

Nelson Rodriguez
D'Escoto, Inc.

William Scheib
Ballas Engineering

Duty A: Planning and Organizing Activities

Tasks:
1 Determine scope of a drafting job
2 Determine numbers and sizes of drawings
3 Apply appropriate drafting standards to drawings
4 Select appropriate drafting techniques for assigned drawings
5 Maintain supporting documents for drawing files

Duty B: Researching Information

Tasks:
1 Locate information using manufacturers' catalogs
2 Locate information using engineering handbooks
3 Locate information using microfilm files
4 Locate information using computer data files
5 Confirm materials availability
6 Research architectural graphic standards

Duty C: Performing General Office Procedures

Tasks:
1 Maintain client rapport
2 Participate in client conferences
3 Interpret plans
4 Coordinate work with engineering personnel
5 Coordinate work with welding shop personnel
6 Coordinate work with sheet metal shop personnel
7 Coordinate architectural drawings
8 Coordinate civil drawings
9 Coordinate structural drawings
10 Coordinate mechanical drawings
11 Coordinate electrical drawings
12 Coordinate other drawings
13 Check plan dimensions
14 Maintain drafting instruments and equipment
15 Clean drafting instruments and equipment
16 File original working drawings
17 Maintain and care for CAD work station
18 Start up, log/on, retrieve, save, log/off and shut down CAD system
19 Analyze and communicate equipment failure
20 Produce schedules

Duty D: Preparing Sketches

Tasks:
1 Draw freehand sketches
2 Draw isometric sketches
3 Draw orthographic sketches
4 Draw pictorial sketches
5 Read and transfer measurements
6 Prepare proportional design sketches
7 Draw oblique sketches

Duty E: Performing Basic Layouts

Tasks:
1 Work from written instructions to produce drawings
2 Work from verbal instructions to produce drawings
3 Perform basic layouts to specified tolerances
4 Render designs in pencil

Duty F: Detailing Drawings

Tasks:
1 Draw individual parts from assembly drawings
2 Draw individual parts from existing parts
3 Interpret assembly drawings
4 Draw orthographic projections
5 Draw sectional views
6 Draw auxiliary views
7 Draw isometric views
8 Draw intersection and development drawings
9 Dimension and tolerance drawings
10 Apply geometric tolerances to drawings
11 Apply standard fits to drawings
12 Apply x-y coordinate dimensioning standards to drawings
13 Add title block information to drawings
14 Letter presentation drawings
15 Note special instructions on drawings

Duty G: Using Reproduction Techniques

Tasks:
1 Reproduce drawings on blueprint machines
2 Reproduce drawings on dry copy machines
3 Create hard copy using a plotter
4 Create hard copy using a printer
5 Copy existing drawings using digitizing techniques

Duty H: Performing Presentation Techniques

Tasks:
1 Prepare plan abbreviations list
2 Produce graphs
3 Produce flow diagrams

Duty I: Producing Architectural Drawings

Tasks:
1 Construct architectural symbols
2 Produce representative architectural drawings
3 Interpret local, state and federal architectural codes
4 Complete FHA specification forms
5 Check architectural drawings
6 Draw presentation floor plans
7 Draw presentation elevation views
8 Draw one point interior presentation views
9 Draw two point interior presentation views
10 Draw exterior perspective views

11 Illustrate landscape features
12 Sketch preliminary plan layouts
13 Sketch preliminary elevations
14 Sketch preliminary sections
15 Draw scaled floor plans
16 Draw foundation plans
17 Draw foundation sections
18 Reproduce common plan features
19 Draw exterior elevations
20 Draw framing plans
21 Draw typical wall sections
22 Draw parapet and roof sections
23 Dimension section drawings
24 Draw stair sections
25 Draw fireplace sections
26 Draw chimney sections
27 Draw door sections
28 Draw window sections
29 Draw bathroom sections
30 Draw cabinet sections and details
31 Draw millwork (trim) sections
32 Draw door and window schedules
33 Draw finish schedules
34 Draw floor sections
35 Draw attic sections
36 Draw shaft sections
37 Draw typical closet sections
38 Prepare residential house plumbing plans
39 Prepare residential house HVAC plans
40 Prepare residential house electrical plans

Duty J: Drawing Light Commercial Building Plans

Tasks:
1 Draw commercial building floor plans
2 Draw commercial building foundation plans
3 Draw commercial building framing plans
4 Draw commercial building roof plans
5 Draw commercial building site plans
6 Draw commercial building elevations
7 Construct commercial building section drawings
8 Prepare commercial building door, window and finish schedules
9 Prepare commercial building plumbing plans
10 Prepare commercial building HVAC plans
11 Prepare commercial building electrical plans
12 Prepare commercial building landscape plans
13 Dimension commercial building plans
14 Check commercial building plans
15 Prepare commercial building quantity estimates

Duty K: Producing Structural Working Drawings

Tasks:
1 Construct structural drafting symbols
2 Interpret local, state and federal structural codes

3 Prepare bills of materials from structural drawings
4 Draw structural steel plans
5 Dimension structural steel drawings
6 Draw beam connections
7 Construct column detail drawings
8 Construct detail truss drawings for timber
9 Prepare structural foundation and slab plans
10 Prepare structural floor framing plans
11 Prepare structural roof framing plans
12 Draw structural sections and details
13 Draw structural concrete foundation plans
14 Prepare column and beam schedule for structural steel
15 Prepare column and beam schedule for reinforcing steel
16 Check structural drawings

Duty L: Producing Mechanical Working Drawings

Tasks:
1 Construct mechanical drafting symbols
2 Construct sheet metal drafting symbols
3 Construct tool design symbols
4 Prepare bills of materials from mechanical drawings
5 Produce parts lists for mechanical assembly drawings
6 Construct mechanical orthographic assembly drawings
7 Construct mechanical orthographic subassembly drawings
8 Detail components of mechanical orthographic assembly drawings
9 Detail components of mechanical orthographic subassembly drawings
10 Construct mechanical isometric assembly drawings
11 Construct mechanical isometric subassembly drawings
12 Construct mechanical isometric exploded view drawings
13 Construct jig drawings
14 Construct fixture drawings
15 Construct sheet metal development drawings
16 Construct HVAC drawings
17 Construct forming die drawings
18 Check mechanical drawings
19 Design new equipment

Duty M: Producing Electrical and Electronic Working Drawings

Tasks:
1 Construct electrical drafting symbols
2 Construct electronic drafting symbols
3 Prepare bills of materials from electrical drawings
4 Prepare bills of materials from electronic drawings
5 Interpret local, state and federal electrical codes
6 Draw electrical block diagrams
7 Draw electrical schematic diagrams
8 Draw electrical connection diagrams
9 Draw electronic block diagrams
10 Draw electronic schematic diagrams
11 Draw electronic connection diagrams
12 Draw industrial controls ladder diagrams
13 Draw electrical power single-line diagrams

Duty N: Producing Civil Engineering Drawings

Tasks:
1 Produce detailed construction drawings
2 Develop topographical profiles
3 Develop specification sheets for highway construction
4 Develop specification sheets for river and harbor improvements
5 Produce plans for flood control

Duty O: Using CAD Command Processes

Tasks:
1 Build data base
2 Edit data base
3 Create plotter files
4 Create disk files
5 Copy disk files
6 Execute specialized programs
7 Develop backup files
8 Restore backup files
9 Develop configure/control changes
10 Develop execute lists using command language
11 Write simple FORTRAN program

Duty P: Producing Drawings Using CAD

Tasks:
1 Generate grid on drawing
2 Select appropriate geometry to create lines, circles and arcs
3 Select appropriate geometry to create curves, tangents, fillets, chamfers and bevels
4 Develop three-dimensional drawings
5 Select appropriate line work, weights and color
6 Apply layering techniques

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
SEPTEMBER 28, 1987

COOK, RESTAURANT/CHEF

(* Denotes entry level skills)

DUTY A: Following Safety Procedures

TASKS:
1 Check work area for safety hazards
2 Remove safety hazards from work area
3 Report safety violations
4 Administer emergency first aid techniques
5 Complete accident reports and records

DUTY B: Cleaning and Sanitizing

TASKS:
1 Clean and sanitize immediate work area
2 Clean and sanitize standard kitchen equipment
3 Clean and sanitize windows and walls in work station
4 Clean and sanitize dry food cabinets
5 Clean and sanitize refrigerated and freezer storage
6 Clean and sanitize cooking and baking utensils
7 Clean and sanitize beverage dispensers

DUTY C: Performing Specialty Service

TASKS:
1 Prepare flaming foods at tableside
2 Serve flaming foods at tableside
3 Carve meat at tableside
4 Toss salad at tableside

DUTY D: Conducting Cost-Control Procedures

TASKS:
1 Receive beverages
2 Purchase food supplies
3 Receive food supplies
4 Store food supplies
5 Issue food supplies from requisition
6 Inventory food supplies
7 Purchase nonfood supplies
8 Receive nonfood supplies
9 Store nonfood supplies
10 Purchase dinnerware, flatware and glassware
11 Schedule food preparation tasks
12 Inventory beverages
13 Specify hot table layout and portion control measures for meal service

14 Analyze operation layout and flow design for efficiency
15 Organize work areas for efficiency of time and motion
16 Purchase equipment
17 Requisition equipment
18 Receive equipment
19 Issue equipment
20 Verify maintenance services completed
21 Requisition food supplies from work station
22 Requisition nonfood supplies from work station
23 Develop and standardize recipes

DUTY E: Coordinating Food Orders

TASKS:
1 Receive food orders
2 Schedule preparation of food items
3 Tally menu items
4 Determine meal census
5 Make food item adjustments for emergency
6 Arrange food items on dinnerware
7 Use food leftovers

DUTY F: Managing a Food Service Operation

TASKS:
1 Determine cost-control procedures
2 Determine personnel policies and procedures
3 Determine safety procedures
4 Determine accident prevention techniques
5 Explain established policies and procedures to employees
6 Monitor compliance with policies and procedures
7 Determine sanitation procedures
8 Conduct safety drills
9 Inspect for signs of rodents and insects
10 Maintain compliance with laws and statutes dealing with food service establishments
11 Determine food and beverage items to make up menus
12 Cost out menu items
13 Determine layout and design of menus
14 Update menus
15 Evaluate effectiveness and efficiency of food service operations
16 Survey market for new products and equipment
17 Determine operating budget
19 Advertise food service operation
18 Collect specimens for bacterial culturing

DUTY G: Managing Personnel

TASKS:
1 Determine staff needs
2 Interview prospective employees
3 Monitor compliance with federal and state hiring laws
4 Explain benefits to employees
5 Analyze job tasks

6 Determine standards for job performance
7 Complete employee evaluation forms
8 Discuss evaluation with staff member
9 Train staff on cooking duties
10 Train staff on baking duties
11 Train staff on safety procedures
12 Train staff on sanitation procedures
13 Train staff on management activities
14 Schedule work hours for employees
15 Conduct staff training sessions
16 Conduct informational staff meetings
17 Settle conflicts between employees
18 Prepare organizational chart
19 Determine staff abilities

DUTY H: Preparing Appetizers

TASKS:
1 Prepare cocktail appetizers
2 Prepare hors d'oeuvres
3 Prepare canapés
4 Prepare relishes
5 Prepare dips
6 Prepare spreads
7 Prepare finger sandwiches
8 Prepare soup appetizers
9 Prepare salad appetizers
10 Prepare vegetable appetizers
11 Prepare beverage appetizers

DUTY I: Preparing Garnishes

TASKS:
*1 Prepare vegetable garnishes
*2 Prepare fruit garnishes
3 Prepare egg garnish

DUTY J: Preparing Stock, Soups and Sauces

TASKS:
*1 Prepare rou
2 Prepare convenience stock
3 Prepare brown stock
4 Prepare clear stock for veal, chicken, and fish
5 Prepare au jus
6 Prepare convenience soups such as canned, frozen and dehydrated soups
7 Prepare clear soups such as consomme and broths
8 Prepare thick soups such as legume, vegetable, chowder, cream and bisque
9 Prepare cold soups
10 Prepare lead or mother sauces such as brown sauce (espagnole), white sauce (bechamel), tomato sauce, velouté sauce and hollandaise sauce

11 Prepare secondary sauces
12 Prepare hot specialty sauces
13 Prepare cold specialty sauces

DUTY K: Preparing Icings

TASKS: *1 Prepare butter cream icing
2 Prepare cooked icing

DUTY L: Preparing Cakes

TASKS: 1 Prepare fruit cakes
2 Prepare sponge-type cakes such as angel food and chiffon
3 Prepare batter cakes such as white, chocolate, yellow, spice, marble, carrot and German chocolate
4 Decorate cakes
5 Prepare ice cream cakes

DUTY M: Preparing Toppings and Fillings

TASKS: 1 Prepare whipped creams
2 Prepare meringues
3 Prepare marshmallow toppings
4 Prepare fruit fillings
5 Prepare cream fillings
6 Prepare custard fillings
7 Prepare chiffon fillings
8 Prepare speciality toppings

DUTY N: Preparing Quickbreads

TASKS: 1 Prepare muffins
2 Prepare pan breads
3 Prepare baking powder biscuits
4 Prepare popovers

DUTY O: Preparing Cookies

TASKS: 1 Prepare hand-cut cookies
2 Prepare machine-cut cookies
3 Prepare drop cookies
4 Prepare refrigerator cookies
5 Prepare bar cookies
6 Prepare bag cookies

DUTY P: Preparing Pies

TASKS:
1 Prepare crusts
2 Prepare crumb-crust pies
3 Prepare single-crust pies
4 Prepare double-crust pies
5 Prepare pies using pre-baked shells
6 Prepare pies with custard fillings, both cooked and instant
7 Prepare fruit-filled pies

DUTY Q: Preparing Yeast-Raised Products

TASKS:
1 Prepare yeast-raised sweetdough products such as rolls, coffee cakes and Danish pastries
2 Prepare fried yeast-raised products such as doughnuts and rolls
3 Prepare yeast-raised bread dough products such as dinner rolls, croissants, and demiloaves
4 Prepare yeast-raised specialty products such as bagels and pretzels

DUTY R: Preparing Vegetables

TASKS:
*1 Prepare vegetables for cooking
*2 Steam vegetables
3 Grill vegetables
4 Broil vegetables
*5 Sauté vegetables
*6 Deep-fry vegetables
*7 Bake vegetables
8 Poach vegetables
9 Stir-fry vegetables
10 Marinate vegetables
11 Prepare vegetable casseroles
*12 Boil vegetables
*13 Prepare raw vegetables

DUTY S: Preparing Desserts

TASKS:
1 Prepare frozen cakes
2 Prepare tortes
3 Prepare cheesecakes
4 Prepare ice creams
5 Prepare fruits for dessert
6 Prepare ices
7 Prepare sorbets
8 Prepare custards
9 Prepare chiffons
10 Prepare puddings
11 Prepare gelatins

DUTY T: Preparing Fruits

TASKS:
*1 Prepare fruits for serving raw
2 Steam fruits
3 Broil fruits
4 Bake fruits
5 Poach fruits
6 Saute fruits
7 Deep-fry fruits
8 Marinate fruits

DUTY U: Preparing Salads

TASKS:
*1 Prepare fruit salads
*2 Prepare vegetable salads
3 Prepare gelatin salads
*4 Prepare leafy green salads
5 Prepare meat salads
6 Prepare cheese salads
7 Prepare seafood salads
8 Prepare pasta salads
9 Prepare oil-based salad dressings
10 Prepare mayonnaise-based salad dressings
11 Prepare diet salad dressings
12 Prepare fruit salad dressings

DUTY V: Preparing Sandwiches

TASKS:
*1 Prepare sandwich items such as meats, cheeses and sandwich spreads
*2 Prepare hot sandwiches
*3 Prepare cold sandwiches

DUTY W: Preparing Foods for Breakfast

TASKS:
1 Boil eggs
*2 Fry eggs
3 Poach eggs
4 Bake eggs
*5 Scramble eggs
*6 Prepare omelets
*7 Prepare hot cereals
*8 Make quickbreads such as waffles, pancakes and French toast
*9 Prepare sausage links and patties
10 Prepare ham
*11 Prepare hash
*12 Prepare bacon
*13 Prepare steak
*14 Prepare Canadian bacon
*15 Grill hash browns

*16 Panfry American fries
*17 Panfry cottage fries
*18 Toast bread
*19 Toast English muffins

DUTY X: Preparing Meats, Poultry, Fish and Shellfish

TASKS:
1 Break down and portion primal or wholesale cuts of beef into secondary or retail cuts
2 Break down and portion primal or wholesale cuts of pork into secondary or retail cuts
3 Break down and portion primal or wholesale cuts of lamb into secondary or retail cuts
4 Break down and portion primal or wholesale cuts of veal into secondary or retail cuts
5 Break down and portion poultry
6 Prepare shellfish for cooking
7 Fillet fish
8 Grind meats
9 Tenderize meats
10 Prepare meat casseroles
11 Broil meats such as beef, pork, veal and lamb
12 Deep-fry meats such as beef, pork, veal and lamb
13 Panfry meats such as beef, pork, veal and lamb
*14 Grill meats such as beef, pork, veal and lamb
15 Roast meats such as beef, pork, veal and lamb
16 Barbecue meats such as beef, pork, veal and lamb
17 Sauté meats such as beef, pork, veal and lamb
18 Stew meats such as beef, pork, veal and lamb
19 Braise meats such as beef, pork, veal and lamb
20 Bake/roast poultry
21 Broil poultry
22 Barbecue poultry
23 Panfry poultry
24 Deep-fry poultry
25 Saute poultry
26 Stew poultry
27 Braise poultry
28 Simmer poultry
29 Bake fish
30 Broil fish
31 Barbecue fish
32 Panfry fish
33 Deep-fry fish
34 Saute fish
35 Poach fish
36 Bake shellfish
37 Broil shellfish
38 Panfry shellfish
39 Deep-fry shellfish
40 Sauté shellfish
41 Poach shellfish
42 Poach variety meats

43 Prepare prefabricated meats
44 Marinate meats, poultry, fish, and shellfish
45 Boil meats, poultry, fish, and shellfish
46 Char-broil meats, poultry, fish, and shellfish
47 Steam meats, poultry, fish, and shellfish

DUTY Y: Preparing Starchy Products

TASKS:
1 Cook rice
2 Cook pasta
3 Cook barley
4 Cook grits
5 Prepare bread dressings
*6 Prepare potatoes

DUTY Z: Prepare Speciality Item

TASKS:
1 Prepare puffed pastry dough
2 Prepare souffles
3 Prepare crepes
4 Prepare mousses
5 Prepare speciality wild game items

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Edward Hughes
Title - First Cook
Chicago Bar Association

Jesse Whitten
Title - Supper Entree Cook
Oak Forest Hospital

Wayne Tankersley
Title - Head Chef
Chicago Public Schools

DUTY A: Following Safety Procedures

TASKS:
1 Check work area for safety hazards
2 Remove safety hazards from work area
3 Report safety violations
4 Administer emergency first aid techniques
5 Complete accident reports and records

DUTY B: Cleaning and Sanitizing

TASKS:
1 Clean and sanitize windows and walls in work station
2 Clean and sanitize beverage dispensers
3 Clean and sanitize kitchen work counters
4 Clean and sanitize dry food cabinets
5 Clean and sanitize refrigerated and freezer storage
6 Clean and sanitize cooking and baking utensils

DUTY C: Performing Specialty Service

TASKS:
1 Prepare flaming foods at tableside
2 Serve flaming foods at tableside
3 Carve meat at tableside
4 Toss salad at tableside

DUTY D: Conducting Cost-Control Procedures

TASKS:
1 Receive beverages
2 Purchase food supplies
3 Receive food supplies
4 Store food supplies
5 Issue food supplies from requisition
6 Inventory food supplies
7 Purchase nonfood supplies
8 Receive nonfood supplies
9 Store nonfood supplies
10 Purchase dinnerware, flatware and glassware
11 Schedule food preparation tasks
12 Inventory beverages
13 Specify hot table layout and portion control measures for meal service
14 Analyze operation layout and flow design for efficiency
15 Organize work areas for efficiency of time and motion
16 Purchase equipment
17 Requisition equipment
18 Receive equipment
19 Issue equipment
20 Verify maintenance services completed

21 Requisition food supplies from work station
22 Requisition nonfood supplies from work station

DUTY E: Coordinating Food Orders

TASKS:
1 Receive food orders
2 Schedule preparation of food items
3 Tally menu items
4 Tabulate types of diets
5 Determine meal census
6 Make food item adjustments for emergency
7 Arrange food items on dinnerware
8 Use food leftovers

DUTY F: Managing a Food Service Operation

TASKS:
1 Determine cost-control procedures
2 Determine personnel policies and procedures
3 Determine safety procedures
4 Determine accident prevention techniques
5 Explain established policies and procedures to employees
6 Monitor compliance with policies and procedures
7 Determine sanitation procedures
8 Conduct safety drills
9 Inspect for signs of rodents and insects
10 Exterminate rodents and insects
11 Maintain compliance with laws and statutes dealing with food service establishments
12 Determine food and beverage items to make up menus
13 Cost out menu items
14 Determine layout and design of menus
15 Update menus
16 Evaluate effectiveness and efficiency of food service operations
17 Develop and standardize recipes
18 Survey market for new products and equipment
19 Determine operating budget
20 Collect specimens for bacterial culturing

DUTY G: Managing Personnel

TASKS:
1 Determine staff needs
2 Interview prospective employees
3 Monitor compliance with federal and state hiring laws
4 Explain benefits to employees
5 Analyze job tasks
6 Determine standards for job performance

7 Complete employee evaluation forms
8 Discuss evaluation with staff member
9 Train staff on cooking duties
10 Train staff on baking duties
11 Train staff on safety procedures
12 Train staff on sanitation procedures
13 Train staff on management activities
14 Schedule work hours for employees
15 Conduct staff training sessions
16 Conduct informational staff meetings
17 Settle conflicts between employees
18 Prepare organizational chart

DUTY H: Preparing Appetizers

TASKS:
1 Prepare cocktail appetizers
2 Prepare hors d'oeuvres
3 Prepare canapés
4 Prepare relishes
5 Prepare dips
6 Prepare spreads
7 Prepare finger sandwiches

DUTY I: Preparing Garnishes

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1 Prepare convenience stock
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TASKS:
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2 Prepare cooked icing

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TASKS:
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6 Prepare custard fillings
7 Prepare chiffon fillings

DUTY N: Preparing Quickbreads

TASKS:
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4 Prepare popovers

DUTY O: Preparing Cookies

TASKS:
1 Prepare hand-cut cookies
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3 Prepare drop cookies
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TASKS:
1 Prepare crumb-crust pies
2 Prepare double-crust pies
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4 Prepare pies using pre-baked shells
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6 Prepare fruit-filled pies

DUTY T: Preparing Fruits

TASKS:
1 Prepare fruits for serving raw
2 Steam fruits
3 Broil fruits
4 Bake fruits
5 Poach fruits
6 Sauté fruits
7 Deep-fry fruits
8 Marinate fruits

DUTY U: Preparing Salads

TASKS:
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4 Prepare leafy green salads
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6 Prepare cheese salads
7 Prepare seafood salads
8 Prepare pasta salads
9 Prepare oil-based salad dressings
10 Prepare mayonnaise-based salad dressings
11 Prepare diet salad dressings
12 Prepare fruit salad dressings

DUTY V: Preparing Sandwiches

TASKS:
1 Prepare sandwich items such as meats, cheeses and sandwich spreads
2 Prepare hot sandwiches
3 Prepare cold sandwiches

DUTY W: Preparing Foods for Breakfast

TASKS:
1 Boil eggs
2 Fry eggs
3 Poach eggs
4 Bake eggs
5 Scramble eggs
6 Prepare omelets
7 Prepare hot cereals
8 Make quickbreads such as waffles, pancakes and French toast
9 Prepare sausage links and patties
10 Prepare hash
11 Prepare ham
12 Prepare bacon
13 Prepare steak
14 Prepare Canadian bacon
15 Grill hash browns
16 Panfry American fries
17 Panfry cottage fries

18 Toast bread
19 Toast English muffins

DUTY X: Preparing Meats, Poultry, Fish and Shellfish

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1 Break down and portion primal or wholesale cuts of beef into secondary or retail cuts
2 Break down and portion primal or wholesale cuts of pork into secondary or retail cuts
3 Break down and portion primal or wholesale cuts of lamb into secondary or retail cuts
4 Break down and portion primal or wholesale cuts of veal into secondary or retail cuts
5 Break down and portion poultry
6 Prepare shellfish for cooking
7 Fillet fish
8 Grind meats
9 Tenderize meats
10 Prepare meat casseroles
11 Broil meats such as beef, pork, veal and lamb
12 Deep-fry meats such as beef, pork, veal and lamb
13 Panfry meats such as beef, pork, veal and lamb
14 Grill meats such as beef, pork, veal and lamb
15 Bake meats such as beef, pork, veal and lamb
16 Barbeque meats such as beef, pork, veal and lamb
17 Sauté meats such as beef, pork, veal and lamb
18 Stew meats such as beef, pork, veal and lamb
19 Braise meats such as beef, pork, veal and lamb
20 Bake poultry
21 Broil poultry
22 Barbeque poultry
23 Panfry poultry
24 Deep-fry poultry
25 Sauté poultry
26 Stew poultry
27 Braise poultry
28 Simmer poultry
29 Bake fish
30 Broil fish
31 Barbeque fish
32 Panfry fish
33 Deep-fry fish
34 Sauté fish
35 Poach fish
36 Bake shellfish
37 Broil shellfish
38 Panfry shellfish

39 Deep-fry shellfish
40 Sauté shellfish
41 Poach shellfish
42 Poach variety meats
43 Prepare prefabricated meats

DUTY Y: Preparing Starchy Products

TASKS: 1 Cook rice
2 Cook barley
3 Cook pasta
4 Cook grits
5 Prepare bread dressings

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
OCTOBER 7, 1987

AUTOMOTIVE MECHANIC

*Entry level

Ds*Entry level can perform under direct supervision due to safety factor

DUTY A: Preparing New Vehicles

TASKS:
- *1 Perform underhood inspections
- *2 Perform underside inspections
- *3 Perform interior and exterior body inspections
- *4 Install basic accessories (e.g. electronic equipment, trim, etc)
- *5 Perform minor repairs

DUTY B: Servicing Suspension and Wheel Systems

TASKS:
- *1 Inspect suspension systems for worn parts
- 2 Remove and replace suspension bushings and king pins
- *3 Inspect tires and wheels for damage and irregular wear
- *4 Remove and replace front wheel bearings
- 5 Repack wheel bearings
- 6 Remove and replace shock absorbers
- *7 Remove and replace control arms
- 8 Remove and replace ball joints
- 9 Rebuild leaf springs assembly
- 10 Remove and replace torsion bars
- 11 Remove and replace coil springs
- 12 Remove and replace spindle
- 13 Remove and replace McPherson strut assembly
- 14 Rebuild McPherson strut assembly
- 15 Remove and replace trunnion pin assembly
- 16 Remove and replace leaf spring assembly
- 17 Remove and replace spring hangers
- 18 Remove and replace "I" beam
- *19 Remove and replace stabilizer and bushings
- 20 Rotate tires
- 21 Balance wheel and tire assembly
- 22 Replace torque arms
- *23 Adjust torsion bar

DUTY C: Performing Steering Services

TASKS:
- *1 Inspect steering gear and linkage for worn parts
- *2 Remove and replace steering linkage components
- 3 Rebuild steering column
- 4 Rebuild power steering pump
- 5 Remove and replace power steering pump and/or hoses
- 6 Rebuild rack and pinion power/manual steering assembly
- 7 Remove and replace rack and pinion power/manual steering assembly
- 8 Remove and replace power steering cylinder
- 9 Rebuild power steering cylinder
- 10 Align rear wheels
- 11 Remove and replace steering column
- 12 Rebuild recirculating ball gear box
- 13 Remove and replace recirculating ball gear box
- 14 Align front end

DUTY D: Servicing Heating and Cooling System

TASKS:
- *1 Determine cause of overheating
- *2 Test thermal sensing switch
- *3 Remove and replace thermal sensing switch
- 4 Flush cooling system
- *5 Test coolant freezing point
- *6 Install antifreeze
- *7 Inspect and replace water hoses
- 8 Remove and replace variable speed fan clutch
- *9 Remove and replace electric cooling fan motor
- *10 Chemically clean cooling system
- *11 Remove and replace thermostat
- *12 Test thermostat
- *13 Pressure test cooling system
- 14 Remove and replace heater hoses
- *15 Remove and replace radiator hoses
- *16 Remove and replace radiator
- 17 Rebuild blower assembly on air-cooled engines
- 18 Remove and replace heater cores
- 19 Remove and replace water pump

DUTY E: Servicing Brake Systems

TASKS:
- 1 Check brake operation
- 2 Inspect brake hoses and lines
- 3 Flush brake system
- 4 Adjust brake shoes
- 5 Free up parking brake cable and linkage

6 Adjust parking brake linkage
7 Remove and replace parking brake cable and linkage
8 Remove and replace parking brake external band
9 Remove and replace brake shoes/pads
10 Remove and replace brake hardware
11 Remove and replace wheel cylinder
12 Rebuild wheel cylinder
13 Cam grind brake shoe
14 Grind (turn) brake drum
15 Place backing plate
16 Remove and replace disc brake rotor
17 Reface disc brake rotor
18 Remove and replace caliper assembly
19 Rebuild caliper assembly
20 Remove and replace master cylinder
21 Rebuild master cylinder
22 Remove and replace vacuum power brake unit
23 Remove and replace hydrobrake booster unit
24 Bleed brake system
25 Remove and replace proportioning meter combination valve)
26 Test brake antilock system
27 Replace defective components in brake antilock system
28 Test rotor parallelism
29 Test rotor runout
30 Replace hydraulic lines and hoses

DUTY F: Servicing Emission Control Systems

TASKS: #1 Test emission control system
#2 Remove and replace vacuum hoses
#3 Test positive crankcase ventilation system
#4 Remove and replace positive crankcase ventilation valve
#5 Test vacuum advance/retard device
#6 Remove and replace vacuum advance/retard device
#7 Test electrical advance/retard device
#8 Check idle solenoid
#9 Remove and replace idle solenoid
#10 Remove and replace deceleration valve
#11 Test/thermostatic air cleaner adjust and/or replace
#12 Check exhaust gas recirculation valve operation
#13 Remove and replace exhaust gas recirculation valve
#14 Check air injection system
#15 Remove and Replace air injection tubing
#16 Remove and replace air pump
#17 Remove and repair diverter and anti-backfire valve

*18 Test fuel evaporation system
*19 Remove and replace closed system charcoal canister filter
*20 Test back pressure of exhaust system
*21 Remove and replace catalytic converter
*22 Remove and replace beads in catalytic converter

DUTY G: Servicing Exhaust Systems

TASKS: *1 Check exhaust system for leaks and restrictions
*2 Remove and replace exhaust system supports
*3 Remove and replace muffler
*4 Remove and replace exhaust pipe
*5 Remove and replace tail pipe
*6 Remove and replace exhaust manifold
*7 Inspect exhaust system
*8 Inspect turbocharger
*9 Replace turbocharger
10 Rebuild turbocharger

DUTY H: Servicing Heating and Air-Conditioning Systems

TASKS: *1 Inspect control cables
*2 Test electrical control circuits
3 Test vacuum components
4 Remove and replace vacuum components
5 Test air-conditioning thermal switch
6 Test blower motor
7 Remove and replace blower motor
8 Test thermostatic clutch switch
9 Remove and replace thermostatic clutch switch
10 Replace refrigeration clutch
11 Inspect air-conditioning magnetic clutch switch
12 Remove and replace air-conditioning magnetic clutch switch (piston type)
13 Inspect clutch and pulley assembly
14 Test air conditioner charge
*15 Test partial charge system
16 Perform leak test with halide torch
17 Perform leak test with electronic tester
18 Remove and replace refrigerant lines
*19 Repair refrigeration controls
20 Fabricate refrigerant lines
21 Remove and replace compressor seals
22 Check compressor oil level
23 Inspect dryer
24 Remove and replace dryer in air-conditioning unit
25 Remove and replace condenser in air-conditioning unit

26 Remove and replace evaporator
27 Remove and replace metering orifice valve (expansion valve)
28 Test throttle-suctioning valve
29 Remove and replace throttle-suctioning valve
30 Remove and replace compressor
31 Rebuild rotary compressor
32 Rebuild axial compressor
33 Remove and replace heater core
34 Install air-conditioning system
35 Remove and replace low pressure cutout switch
36 Remove and replace high pressure cutout switch
37 Evacuate and charge refrigeration system

DUTY I: Servicing Fuel Systems

TASKS:
*1 Test carburetor adjustment using combustion analyzer
*2 Test carburetor adjustment using infrared tester
*3 Test carburetor adjustment using propane enrichment apparatus
*4 Adjust carburetor idle mixture
*5 Adjust antistall device
*6 Inspect carburetor linkage for binding and worn parts
*7 Check for vacuum/fuel leaks
*8 Remove and replace carburetor air cleaner
*9 Clean automatic choke
*10 Adjust automatic choke
*11 Free up manifold heat riser valve
12 Remove and replace manifold heat riser valve
13 Clean heat riser passages
14 Adjust float
15 Adjust carburetor metering rods
16 Remove and replace carburetor metering jets
17 Remove and replace carburetor
18 Rebuild carburetor
19 Remove and replace fuel filter unit
ds*20 Test and adjust fuel pump
ds*21 Remove and replace fuel pump
22 Test and adjust fuel injection system
23 Remove and replace electrical fuel injector computer
24 Test wiring harness of electronic fuel injection system
25 Remove and replace fuel injection nozzle
26 Rebuild fuel injection nozzle
27 Remove and replace fuel injection pump
28 Rebuild fuel injection pump
29 Check waste gate adjustment

30 Adjust waste gate adjustment
31 Remove and replace fuel lines
32 Remove and replace fuel tank
ds*33 Remove and replace fuel level sending unit
ds*34 Test electronic fuel mixture control system
ds*35 Time diesel engine injector pump
36 Remove and replace injector (diesel)
37 Remove and replace injector line (diesel)
38 Test injector spray pattern (diesel)
39 Test calibration of injector lines (diesel)
40 Bleed fuel system
41 Clean fuel filter
42 Clean air cleaner element
43 Remove and replace wiring harness of electronic fuel system

DUTY J: Servicing Ignition Systems

TASKS: *1 Test engine using engine analyzer
*2 Test point dwell
*3 Remove and replace distributor cap
*4 Remove and replace distributor rotor
*5 Inspect distributor for worn parts
*6 Remove and replace points
*7 Remove and replace condenser
*8 Test condenser
*9 Remove and replace distributor
*10 Rebuild distributor
*11 Test control unit (electronic)
*12 Remove and replace control unit (electronic)
*13 Test pickup coil (electronic)
*14 Remove and replace pickup coil (electronic)
*15 Test automatic spark advance mechanism
*16 Remove and replace spark advance mechanism
*17 Adjust point dwell
*18 Test ignition timing
*19 Adjust ignition timing
*20 Test ignition coil
*21 Test primary circuit resistance
*22 Test secondary circuit continuity
*23 Test spark plug wire resistance
*24 Remove and replace spark plug wires
*25 Remove and replace spark plugs
*26 Clean spark plugs
*27 Gap spark plugs
*28 Test glow plug electrical system
*29 Test glow plug
*30 Remove and replace glow plug
*31 Test distributor

DUTY K: Servicing Automatic Transmissions

TASKS: *1 Pressure test transmission in vehicle
*2 Stall test automatic transmission in vehicle
*3 Remove and replace transmission oil and

*4 Adjust automatic transmission shift linkage
*5 Test vacuum and/or mechanical detent system
*6 Remove and replace vacuum shift modulator
*7 Adjust bands
*8 Remove and replace transmission governor
9 Clean transmission governor
10 Clean transmission valve body
11 Remove and replace automatic transmission with convertor assembly
12 Rebuild automatic transmission assembly
13 Test drive and diagnose automatic transmission
14 Remove and replace extension housing seal and bushing
15 Splice cooler lines
16 Test electrical controls of automatic clutch converter

DUTY L: Performing Engine Mechanical Diagnosis

TASKS: *1 Test cylinder balance using engine analyzer
*2 Test cylinder leakage and compression
*3 Inspect engine for vacuum leaks
*4 Inspect engine for oil leaks
*5 Inspect to determine cause of overheating
*6 Inspect cooling system for source of coolant loss
*7 Inspect valve train and guides for cause of malfunctions
*8 Inspect engine for source of mechanical engine noise

DUTY M: Servicing Engine Blocks

TASKS:ds*1 Steam clean engine
ds*2 Test oil pressure
ds*3 Remove and replace motor mounts
ds*4 Remove and replace engine assembly
ds*5 Remove and replace oil pan
ds*6 Remove and replace bearing(s)
ds*7 Inspect block for warp
ds*8 Bore cylinders
ds*9 Replace intake manifold
ds*10 Replace connecting rods and pistons
ds*11 Replace vibration damper
ds*12 Replace crankshaft assembly
ds*13 Replace camshaft assembly
ds*14 Replace oil seals
ds*15 Replace core plugs

DUTY N: Servicing Cylinder Heads and Valve Trains

Tasks:ds*1 Inspect for rocker arm lubrication
ds*2 Test valve lifters
ds*3 Remove and replace cylinder head

ds*4 Inspect cylinder head for warp or cracks
ds*5 Rebuild cylinder head
ds*6 Remove and replace timing chain or belt
ds*7 Remove and replace timing gear
ds*8 Remove and replace camshaft
ds*9 Remove and replace camshaft bearings
ds*10 Adjust hydraulic valve lifters
ds*11 Adjust mechanical valve lifters

DUTY O: Servicing Electrical Systems

TASKS:ds*1 Inspect battery electrolyte level
ds*2 Test battery with hydrometer
ds*3 Test battery for surface leakage
ds*4 Test battery voltage
ds*5 Test battery for capacity (load)
ds*6 Clean battery, posts and cable connections
ds*7 Measure ground system resistance
ds*8 Remove and replace battery cables
ds*9 Charge battery
ds*10 Test charging system output
ds*11 Test alternator output
ds*12 Remove and replace generator or alternator
ds*13 Rebuild generator
ds*14 Rebuild alternator
ds*15 Remove and replace charging system regulator
ds*16 Test starter control circuit
ds*17 Test starter current draw
ds*18 Remove and replace starter solenoid
ds*19 Test electrical motors
ds*20 Remove and replace starter
ds*21 Rebuild starter
ds*22 Test switches
ds*23 Remove and replace switches
ds*24 Test fuses
ds*25 Remove and replace fuses
ds*26 Test circuit breakers
ds*27 Remove and replace circuit breakers
ds*28 Remove and replace fuse block assembly
ds*29 Remove and replace light bulbs
ds*30 Remove and replace sockets
ds*31 Adjust headlights
ds*32 Test parking light circuit
ds*33 Remove and replace dimmer switch
ds*34 Test/repair turn signal circuit and four way circuit
ds*35 Remove and replace turn signal switch
ds*36 Adjust backup light switch
ds*37 Remove and replace backup light switch
ds*38 Adjust stop light switch
ds*39 Remove and replace stop light switch
ds*40 Check horn circuit

ds*41 Test horn relay
ds*42 Remove and replace horn relay
ds*43 Remove and replace horn
ds*44 Test windshield wiper circuit
ds*45 Remove and replace windshield wiper motor
ds*46 Test constant voltage regulator
ds*47 Remove and replace constant voltage regulator
ds*48 Adjust voltage regulator output
ds*49 Test instrument gauges
ds*50 Remove and replace instrument gauges
ds*51 Test sending units
ds*52 Remove and replace sending units
ds*53 Test warning lamps
ds*54 Remove and replace warning lamps

DUTY P: Servicing Electrical Accessories

TASKS:
1 Test malfunctioning electrical accessories
2 Remove and replace cruise control components
3 Remove and replace automatic alarm system components
4 Inspect radio speaker
5 Remove and replace radio speaker
6 Remove and replace radio antenna
7 Trim radio antenna
8 Remove and replace power antenna motor
9 Remove and replace power window motors
10 Remove and replace power seat motors
11 Remove and replace cigarette lighter receptacle
12 Replace radio components
13 Repair windshield wipers
14 Repair electrical shift mechanisms
15 Repair lighting system

DUTY Q: Servicing Manual Transmissions

TASKS:
*1 Inspect and adjust shift linkage
*2 Adjust clutch
*3 Remove and replace extension housing seal and bushing
*4 Remove and replace manual transmission
*5 Rebuild manual transmission
*6 Remove and replace clutch assembly
*7 Remove and replace hydraulic clutch slave cylinder
8 Rebuild hydraulic clutch slave cylinder
9 Remove and replace hydraulic clutch master cylinder
10 Rebuild hydraulic clutch master cylinder
11 Replace flywheel

12 Measure bellhousing runout
13 Remove and replace four-wheel-drive transfer case
14 Rebuild four-wheel-drive transfer case
*15 Check fluid levels

DUTY R: Servicing Drive Lines

TASKS: *1 Inspect drive line for worn parts
*2 Lubricate universal joint
*3 Remove and replace universal joint
*4 Remove and replace trunnion joint
*5 Lubricate speedometer cable
*6 Remove and replace speedometer cable
*7 Remove and replace speedometer drive gear
*8 Remove and replace axle seal
*9 Remove and replace axle bearing
*10 Balance drive shaft (in car)
*11 Remove and replace transmission mount
*12 Check drive line angles
13 Remove and replace differential assembly (integral)
14 Remove and replace differential assembly (removable)
15 Rebuild differential assembly (integral)
16 Rebuild differential assembly (removable)
17 Remove and replace transaxle assembly
18 Rebuild transaxle assembly
19 Remove and replace front-wheel-drive axle assemblies
20 Rebuild four-wheel-drive locking hubs
21 Remove and replace pinion seal
22 Rebuild power takeoff
23 Remove and replace drive shaft center support bearings
24 Rebuild constant velocity universal joints
*25 Remove and replace constant velocity joints
*26 Repack constant velocity joints
*27 Remove and replace constant velocity boots

DUTY S: Performing Welding and Oxy-Fuel Cutting

TASKS: *1 Set up oxy-fuel welding and cutting equipment
*2 Braze mild steel
*3 Solder copper tubing
*4 Cut mild steel with oxy-fuel equipment
*5 Set up shielded metal arc welding equipment
*6 Weld 3/16" mild steel in flat position
*7 Weld 3/16" mild steel in horizontal position
*8 Solder electrical components and wire
*9 Heat metal parts to assist in removal
*10 Weld cast iron
*11 Braze cast iron

DUTY T: Performing Diesel Engine Tune-Ups

TASKS:
- #1 Test and adjust air inductor system
- #2 Test fuel system
- #3 Adjust injector timing
- #4 Adjust valve clearance
- #5 Adjust fuel pressure
- #6 Adjust control rack
- #7 Check and adjust linkage for full throttle operation

DUTY U: Performing Safety Practices

TASKS:
- #1 Apply shop and equipment safety rules
- #2 Apply first aid procedures
- #3 Complete an accident report
- #4 Evaluate personnel safety violations
- #5 Inspect the workplace for safe working environment
- #6 Report shop safety violations
- #7 Correct safety violations
- #8 Participate in shop safety committee

DUTY V: Performing Preventative Maintenance

TASKS:
- #1 Perform underside inspections
- #2 Service crankcase lube
- #3 Service fuel filter
- 4 Perform underhood inspections
- 5 Complete lubrication operations
- 6 Service tires

DUTY W: Perform Maintenance Control Functions

TASKS:
- #1 Complete labor time cards
- #2 Complete requests for procurement of parts
- #3 Complete unsatisfactory reports
- #4 Enter work performed on work orders
- #5 Follow up on requisitions
- #6 Initiate and complete work order
- #7 Initiate request for parts
- #8 Maintain daily work control logs or status boards
- #9 Plan, schedule and control maintenance of vehicles
- #10 Prepare reports of vehicle defects
- #11 Spot check service orders

DUTY X: Performing Precision Measurements: Mechanical/Electrical

TASKS:
- #1 Measure parts using standard and metric measurement systems
- #2 Measure parts with steel rule
- #3 Measure parts using dial indicators

#4 Measure parts using outside micrometers
#5 Measure parts using inside micrometers
#6 Measure parts using depth micrometers
#7 Measure parts using special micrometers
#8 Measure parts using inside and outside calipers
#9 Measure threads
#10 Calibrate precision measuring tools
#11 Clean and store precision measuring tools

DUTY Y: Performing Chassis and Cab Maintenance

TASKS: #1 Replace torque arms
#2 Repair doors
#3 Install windshield, back and side glass
#4 Inspect and service hood
#5 Inspect and repair mirrors
#6 Inspect and service ventilation system
#7 Inspect and service seat

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Joesph Croughan
Manager-Mechanic
Passaglia's Auto Repair

David Michalek
Auto Mechanic
Illinois Bell

Joseph Wormack, Jr.
Automotive Instructor
Kennedy-King College

Everett Saffold
Tire and Battery Installer
Sears Automotive

Joseph Czepczynski
Auto Mechanic
Fanning Cadillac

DUTY A: Preparing New Vehicles

TASKS:
1 Adjust and lubricate door hinges and striker plates
2 Locate water leaks
3 Seal water leaks
4 Locate duct leaks
5 Seal duct leaks
6 Locate rattles and noises
7 Install door moldings
8 Remove and replace window regulators
9 Adjust window regulators
10 Install air shocks
11 Install C.B. and radios

DUTY B: Servicing Suspension Systems

TASKS:
1 Inspect suspension systems for worn parts
2 Remove and replace suspension bushings and king pins
3 Inspect tires and wheels for damage and irregular wear
4 Remove and replace front wheel bearings (drum brakes)
5 Remove and replace front wheel bearings (disc brakes)
6 Repack wheel bearings
7 Remove and replace shock absorbers
8 Remove and replace control arms
9 Remove and replace ball joints
10 Remove and replace torsion bars
11 Remove and replace coil springs
12 Remove and replace spindle
13 Remove and replace McPherson strut assembly
14 Rebuild McPherson strut assembly
15 Remove and replace trunnion pin assembly
16 Remove and replace leaf spring assembly
17 Remove and replace spring hangers
18 Remove and replace "I" beam
19 Remove and replace stabilizer and bushings
20 Replace idler arm
21 Replace pitman arm
22 Inspect torque arms
23 Replace torque arms
24 Inspect and adjust torsion bar
25 Inspect ball joints

DUTY C: Servicing Heating and Cooling System

TASKS:
1 Determine cause of overheating
2 Test thermal sensing switch
3 Remove and replace thermal sensing switch
4 Remove and replace drive belts
5 Test coolant freezing point
6 Install antifreeze
7 Inspect and replace water hoses
8 Check variable speed fan clutch
9 Remove and replace variable speed fan clutch
10 Remove and replace electric cooling fan motor

11 Chemically clean cooling system
12 Remove and replace thermostat
13 Test thermostat
14 Test coolant pressure caps
15 Pressure test cooling system
16 Remove and replace heater hoses
17 Remove and replace radiator hoses
18 Remove and replace radiator
19 Rebuild blower assembly on air-cooled engines
20 Remove and replace heater cores
21 Remove and replace water pump

DUTY D: Performing Steering and Wheel Services

TASKS:
1 Inspect steering gear and linkage for worn parts
2 Check and service fluid level
3 Lubricate steering gear and linkage
4 Test tire pressure
5 Rotate tires
6 Balance wheel and tire assembly
7 Adjust steering sector
8 Remove and replace steering linkage components
9 Remove and replace manual steering sector
10 Remove and replace steering damper
11 Remove and replace power steering hoses
12 Remove and replace belt(s) and set tension
13 Remove and replace power steering cylinder
14 Remove and replace power steering control valve assembly
15 Rebuild power steering control valve assembly
16 Remove and replace power steering pump
17 Rebuild rack and pinion power steering assembly
18 Rebuild rack and pinion manual steering assembly
19 Adjust toe-in
20 Align front end
21 Align rear wheels
22 Remove and replace turn signal switch
23 Remove and replace ignition switch rack
24 Remove and replace steering wheel
25 Remove and replace mast jacket
26 Set center line steering
27 Check steering axis inclination
28 Remove and replace tilt wheel and telescope
29 Remove and replace power steering seals
30 Remove and replace four-way switch
31 Rebuild steering column
32 Remove and replace steering column bearings, shift tube and socket
33 Remove and replace steering column
34 Replace shift detent in column
35 Remove and replace rack and pinion power steering assembly

DUTY E: Servicing Brake Systems

TASKS:
1 Check brake operation

2 Inspect brake hoses and lines
3 Flush brake system
4 Adjust brake shoes
5 Free up parking brake cable and linkage
6 Adjust parking brake linkage
7 Remove and replace parking brake cable and linkage
8 Remove and replace parking brake external band
9 Remove and replace brake shoes
10 Remove and replace self-adjusters
11 Remove and replace wheel cylinder
12 Rebuild wheel cylinder
13 Cam grind brake shoe
14 Grind (turn) brake drum
15 Recondition backing plate
16 Remove and replace disc brake rotor
17 Reface disc brake rotor
18 Remove and replace caliper assembly
19 Rebuild caliper assembly
20 Remove and replace master cylinder
21 Rebuild master cylinder
22 Remove and replace hydraulic power brake unit
23 Remove and replace hydrobrake booster unit
24 Bleed brake system
25 Remove and replace proportioning meter (combination valve)
26 Test brake antilock system
27 Replace defective components in brake antilock system
28 Test rotor parallelism
29 Test rotor runout
30 Torque wheel lug nuts
31 Check and service fluid level
32 Replace wheels
33 Repack wheel bearings
34 Replace hydraulic lines and hoses
35 Adjust air brakes

DUTY F: Servicing Emission Control Systems

TASKS: 1 Test emission control system using propane enrichment apparatus
2 Remove and replace vacuum hoses
3 Test positive crankcase ventilation system
4 Remove and replace positive crankcase ventilation valve
5 Remove and replace positive crankcase ventilation valve hose(s)
6 Test vacuum advance/retard device
7 Remove and replace vacuum advance/retard device
8 Test electrical advance/retard device
9 Check idle solenoid
10 Remove and replace idle solenoid
11 Remove and replace deceleration valve
12 Test thermostatic air cleaner
13 Adjust thermostatic air cleaner
14 Remove and replace thermostatic air cleaner
15 Check exhaust gas recirculation valve operation
16 Remove and replace exhaust gas recirculation valve

17 Check air injection system
18 Remove and replace air pump
19 Remove and repair diverter and anti-backfire valve
20 Test fuel evaporation system
21 Remove and replace closed system charcoal canister filter
22 Test back pressure of exhaust system
23 Remove and replace catalytic converter
24 Remove and replace beads in catalytic converter
25 Test exhaust oxygen sensor
26 Remove and replace exhaust oxygen sensor
27 Test electronic fuel mixture control system

DUTY G: Servicing Exhaust Systems

TASKS:
1 Check exhaust system for leaks and restrictions
2 Remove and replace exhaust system supports
3 Remove and replace converter beads
4 Remove and replace catalytic converter
5 Remove and replace muffler
6 Remove and replace exhaust pipe
7 Remove and replace tail pipe
8 Remove and replace exhaust manifold
9 Inspect exhaust system
10 Inspect exhaust manifold
11 Inspect turbocharger
12 Replace turbocharger
13 Rebuild turbocharger

DUTY H: Servicing Heating and Air-Conditioning Systems

TASKS:
1 Inspect control cables
2 Test electrical control circuits
3 Remove and replace compressor belts
4 Test vacuum components
5 Remove and replace vacuum components
6 Test air-conditioning thermal switch
7 Test blower motor
8 Remove and replace blower motor
9 Test thermostatic clutch switch
10 Remove and replace thermostatic clutch switch
11 Inspect air-conditioning magnetic clutch switch
12 Remove and replace air-conditioning magnetic clutch switch (piston type)
13 Inspect clutch and pulley assembly
14 Remove and replace clutch and hub assembly (rotary type)
15 Test air conditioner charge
16 Charge system using pound cans
17 Charge system using bulk source
18 Perform leak test with halide torch
19 Perform leak test with electronic tester
20 Remove and replace refrigerant lines
21 Fabricate refrigerant lines
22 Remove and replace compressor seals
23 Check compressor oil level

24 Inspect dryer
25 Remove and replace dryer in air-conditioning unit
26 Remove and replace condenser in air-conditioning unit
27 Remove and replace evaporator
28 Remove and replace metering orifice valve (expansion valve)
29 Test throttle-suctioning valve
30 Remove and replace throttle-suctioning valve
31 Test compressor reed plates
32 Remove and replace compressor reed plates
33 Remove and replace compressor
34 Rebuild rotary compressor (swash-plate)
35 Remove and replace heater core
36 Install air-conditioning system
37 Remove and replace low pressure cutout switch
38 Remove and replace high pressure cutout switch
39 Evacuate and charge refrigeration system
40 Check system for leaks
41 Replace refrigeration clutch
42 Inspect refrigeration controls
43 Repair refrigeration controls

DUTY I: Servicing Fuel Systems

TASKS:
1 Test carburetor adjustment using combustion analyzer
2 Test carburetor adjustment using infrared tester
3 Test carburetor adjustment using propane enrichment apparatus
4 Adjust carburetor idle mixture
5 Adjust antistall device
6 Inspect carburetor linkage for binding and worn parts
7 Check carburetor for vacuum leaks
8 Remove and replace carbureter air cleaner
9 Clean automatic choke
10 Adjust automatic choke
11 Free up manifold heat riser valve
12 Remove and replace manifold heat riser valve
13 Clean heat riser passages
14 Adjust float
15 Adjust carburetor metering rods
16 Remove and replace carburetor metering jets
17 Remove and replace carbureter
18 Rebuild carbureter
19 Remove and replace fuel filter unit
20 Test and adjust fuel pump
21 Remove and replace fuel pump
22 Test and adjust fuel injection system
23 Remove and replace electrical fuel injector computer
24 Test wiring harness of electronic fuel injection system
25 Remove and replace fuel injection nozzle
26 Rebuild fuel injection nozzle
27 Remove and replace fuel injection pump
28 Rebuild fuel injection pump
29 Check waste gate adjustment
30 Adjust waste gate adjustment
31 Remove and replace turbocharger

32 Rebuild turbocharger
33 Remove and replace fuel lines
34 Remove and replace fuel tank
35 Remove and replace fuel level sending unit
36 Test electronic fuel mixture control system
37 Time diesel engine injector pump
38 Remove and replace injector (diesel)
39 Remove and replace injector line (diesel)
40 Test injector spray pattern (diesel)
41 Test calibration of injector lines (diesel)
42 Bleed fuel system
43 Clean fuel filter
44 Check air cleaner element
45 Clean air cleaner element
46 Remove and replace wiring harness of electronic fuel system

DUTY J: Servicing Ignition Systems

TASKS: 1 Test engine using engine analyzer
2 Test point dwell
3 Remove and replace distributor cap
4 Remove and replace distributor rotor
5 Inspect distributor for worn parts
6 Remove and replace points
7 Remove and replace condenser
8 Test condenser
9 Remove and replace distributor
10 Rebuild distributor
11 Test control unit (electronic)
12 Remove and replace control unit (electronic)
13 Test pickup coil (electronic)
14 Remove and replace pickup coil (electronic)
15 Test automatic spark advance mechanism
16 Remove and replace spark advance mechanism
17 Adjust point dwell
18 Test ignition timing
19 Adjust ignition timing
20 Test ignition coil
21 Test primary circuit resistance
22 Test secondary circuit continuity
23 Test spark plug wire resistance
24 Remove and replace spark plug wires
25 Remove and replace spark plugs
26 Clean spark plugs
27 Gap spark plugs
28 Test glow plug electrical system
29 Test glow plug
30 Remove and replace glow plug
31 Test solenoid
32 Replace solenoid
33 Test distributor
34 Time distributor to engine
35 Test generator/alternator
36 Replace generator/alternator
37 Test regulator

38 Replace regulator

DUTY K: Servicing Automatic Transmissions

TASKS:
1 Pressure test transmission in vehicle
2 Stall test automatic transmission in vehicle
3 Clean transmission oil strainer
4 Remove and replace transmission oil filter
5 Adjust automatic transmission shift linkage
6 Test vacuum shift modulator
7 Remove and replace vacuum shift modulator
8 Adjust bands
9 Remove and replace transmission governor
10 Clean transmission governor
11 Clean transmission valve body
12 Remove and replace automatic transmission with convertor assembly
13 Remove and replace automatic transmission without convertor assembly
14 Rebuild automatic transmission assembly
15 Measure convertor turbine end play
16 Air pressure test transmission on bench
17 Pressure flush converter assembly
18 Pressure flush automatic transmission cooler assembly
19 Remove and replace torque converter
20 Remove and replace extension housing seal and bushing
21 Splice cooler lines
22 Replenish transmission oil
23 Test electrical controls of automatic clutch converter
24 Inspect and replace automatic transmission
25 Inspect and service drive shaft and U-joints
26 Replace U-joints
27 Replace single speed differential
28 Rebuild single speed differential
29 Replace axles and seals

DUTY L: Performing Engine Mechanical Diagnosis

TASKS:
1 Test cylinder balance using engine analyzer
2 Test cylinder leakage
3 Inspect engine for vacuum leaks
4 Inspect engine for oil leaks
5 Inspect to determine cause of overheating
6 Inspect cooling system for source of coolant loss
7 Inspect valve train and guides for cause of malfunctions
8 Inspect engine for source of mechanical engine noise

DUTY M: Servicing Engine Blocks

TASKS:
1 Steam clean engine
2 Test oil pump pressure
3 Test oil pressure relief valve
4 Remove and replace motor mounts

5 Remove and replace engine assembly
6 Remove and replace oil pan
7 Remove and replace rod bearing(s)
8 Remove and replace crankshaft
9 Inspect block for warp
10 Bore cylinders
11 Hone cylinders
12 Install cam bearings
13 Assemble short block
14 Check engine compression
15 Replace intake manifold
16 Inspect and replace exhaust manifold
17 Replace clutch assembly
18 Replace turboblower
19 Replace water pump
20 Replace cylinder heads
21 Replace connecting rods and pistons
22 Replace vibration damper
23 Replace crankshaft assembly
24 Replace camshaft assembly
25 Replace oil seals
26 Replace freeze plugs

DUTY N: Servicing Cylinder Heads and Valve Trains

Tasks: 1 Inspect for rocker arm lubrication
2 Remove and replace intake manifold
3 Test valve lifters
4 Remove and replace cylinder head
5 Inspect cylinder head for warp or cracks
6 Rebuild cylinder head
7 Remove and replace harmonic balancer
8 Remove and replace timing chain or belt
9 Remove and replace timing gear
10 Remove and replace camshaft
11 Remove and replace camshaft bearings
12 Adjust hydraulic valve lifters
13 Adjust mechanical valve lifters

DUTY O: Servicing Electrical Systems

TASKS: 1 Inspect battery electrolyte level
2 Test battery with hydrometer
3 Test battery for surface leakage
4 Test battery voltage
5 Test battery for capacity (load)
6 Clean battery, posts and cable connections
7 Measure ground system resistance
8 Remove and replace battery cables
9 Charge battery
10 Test charging system output
11 Test alternator output
12 Remove and replace generator or alternator
13 Rebuild generator

14 Rebuild alternator
15 Remove and replace charging system regulator
16 Test starter control circuit
17 Test starter current draw
18 Remove and replace starter solenoid
19 Test electrical motors
20 Remove and replace starter
21 Rebuild starter
22 Test switches
23 Remove and replace switches
24 Test fuses
25 Remove and replace fuses
26 Test circuit breakers
27 Remove and replace circuit breakers
28 Remove and replace fuse block assembly
29 Inspect lighting system for faulty bulbs
30 Remove and replace light bulbs
31 Remove and replace sockets
32 Adjust headlights
33 Test parking light circuit
34 Remove and replace dimmer switch
35 Test turn signal circuit
36 Remove and replace turn signal switch
37 Adjust backup light switch
38 Remove and replace backup light switch
39 Adjust stop light switch
40 Remove and replace stop light switch
41 Check horn circuit
42 Test horn relay
43 Remove and replace horn relay
44 Remove and replace horn
45 Test windshield wiper circuit
46 Remove and replace windshield wiper motor
47 Test constant voltage regulator
48 Remove and replace constant voltage regulator
49 Adjust voltage regulator output
50 Test generator output
51 Test instrument gauges
52 Remove and replace instrument gauges
53 Test sending units
54 Remove and replace sending units
55 Test warning lamps
56 Remove and replace warning lamps

DUTY P: Servicing Electrical Accessories

TASKS: 1 Test cruise control unit
2 Remove and replace cruise control components
3 Test automatic alarm system
4 Remove and replace automatic alarm system components
5 Test radio power circuit
6 Inspect radio speaker
7 Remove and replace radio speaker
8 Test radio antenna
9 Remove and replace radio antenna

10 Trim radio antenna
11 Remove and replace power antenna motor
12 Remove and replace power window motors
13 Remove and replace power seat motors
14 Test cigarette lighter circuit
15 Remove and replace cigarette lighter receptacle
16 Replace radio components
17 Repair windshield wipers
18 Test lighting systems
19 Test electrical shift mechanisms
20 Repair electrical shift mechanisms
21 Repair lighting system

DUTY Q: Servicing Manual Transmissions

TASKS:
1 Inspect and adjust shift linkage
2 Adjust manual clutch
3 Adjust hydraulic clutch free travel
4 Remove and replace extension housing seal and bushing
5 Remove and replace manual transmission
6 Rebuild manual transmission
7 Remove and replace pressure plate assembly
8 Remove and replace clutch release bearing
9 Remove and replace release fork
10 Remove and replace pilot bearing
11 Remove and replace hydraulic clutch slave cylinder
12 Rebuild hydraulic clutch slave cylinder
13 Remove and replace hydraulic clutch master cylinder
14 Rebuild hydraulic clutch master cylinder
15 Measure flywheel runout
16 Replace flywheel
17 Measure bellhousing runout
18 Remove and replace four-wheel-drive transfer case
19 Rebuild four-wheel-drive transfer case
20 Check fluid levels

DUTY R: Servicing Drive Lines

TASKS:
1 Inspect drive line for worn parts
2 Lubricate universal joint
3 Remove and replace universal joint
4 Remove and replace trunnion joint
5 Lubricate speedometer cable
6 Remove and replace speedometer cable
7 Remove and replace speedometer drive gear
8 Remove and replace axle seal
9 Remove and replace axle bearing
10 Balance drive shaft (in car)
11 Remove and replace transmission mount
12 Check drive line angles
13 Remove and replace differential assembly (integral)
14 Remove and replace differential assembly (removable)
15 Rebuild differential assembly (integral)
16 Rebuild differential assembly (removable)

17 Remove and replace transaxle assembly
18 Rebuild transaxle assembly
19 Remove and replace front-wheel-drive axle assemblies
20 Rebuild four-wheel-drive locking hubs
21 Remove and replace pinion seal
22 Rebuild power takeoff
23 Remove and replace drive shaft center support bearings
24 Rebuild constant velocity universal joints
25 Remove and replace constant velocity joints
26 Repack constant velocity joints
27 Remove and replace constant velocity boots

DUTY S: Performing Welding and Oxy-Fuel Cutting

TASKS: 1 Set up oxy-fuel welding and cutting equipment
2 Braze mild steel
3 Solder copper tubing
4 Cut mild steel with oxy-fuel equipment
5 Set up shielded metal arc welding equipment
6 Weld 3/16" mild steel in flat position
7 Weld 3/16" mild steel in horizontal position
8 Solder electrical components and wire
9 Heat metal parts to assist in removal
10 Weld cast iron
11 Braze cast iron

DUTY T: Performing Diesel Engine Tune-Ups

TASKS: 1 Test and adjust air inductor system
2 Test fuel system
3 Adjust injector timing
4 Adjust valve clearance
5 Adjust fuel pressure
6 Adjust control rack
7 Check and adjust linkage for full throttle operation

DUTY U: Performing Safety Practices

TASKS: 1 Apply shop and equipment safety rules
2 Apply first aid procedures
3 Complete an accident report
4 Evaluate personnel safety violations
5 Inspect the workplace for safe working environment
6 Report shop safety violations
7 Correct safety violations
8 Participate in shop safety committee

DUTY V: Performing Preventative Maintenance

TASKS: 1 Perform underside inspections
2 Service crankcase lube
3 Service fuel filter

4 Perform underhood inspections
5 Complete lubrication operations
6 Service tires

DUTY W: Perform Maintenance Control Functions

TASKS:
1 Complete labor time cards
2 Complete requests for procurement of parts
3 Complete unsatisfactory reports
4 Enter work performed on work orders
5 Follow up on requisitions
6 Initiate and complete work order
7 Initiate request for parts
8 Maintain daily work control logs or status boards
9 Plan, schedule and control maintenance of vehicles
10 Prepare reports of vehicle defects
11 Spot check service orders

DUTY X: Performing Precision Measurements

TASKS:
1 Measure parts using standard and metric measurement systems
2 Measure parts with steel rule
3 Measure parts using dial indicators
4 Measure parts using outside micrometers
5 Measure parts using inside micrometers
6 Measure parts using depth micrometers
7 Measure parts using special micrometers
8 Measure parts using inside and outside calipers
9 Measure threads
10 Calibrate precision measuring tools
11 Clean and store precision measuring tools

DUTY Y: Performing Chassis and Cab Maintenance

TASKS:
1 Replace torque arms
2 Repair doors
3 Install windshield, back and side glass
4 Inspect and service hood
5 Inspect and repair mirrors
6 Inspect and service ventilation system
7 Inspect and service seat

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
OCTOBER 14, 1987

CARPENTER

(* Denotes entry level skills)

Duty A: Applying Safety Practices

TASKS:
- *1 Comply with shop and equipment safety rules
- *2 Apply basic Red Cross emergency first aid techniques
- 3 Complete accident reports
- *4 Inspect workplaces for safe working environment
- *5 Report shop, environmental and equipment safety violations
- *6 Demonstrate use of fire extinguishers
- 7 Participate in disaster control exercises
- 8 Participate in shop safety committees
- *9 Correct safety hazards
- 10 Participate in safety training programs
- 11 Evaluate personnel safety violations

Duty B: Performing Supervisory Functions

TASKS:
- *1 Comply with all applicable local, state and national building codes and regulations
- 2 Determine availability of machines, supplies and materials
- 3 Requisition, schedule and distribute supplies and materials
- 4 Coordinate workers with work to be done
- 5 Schedule and control shop flow of jobs
- 6 Maintain files
- 7 Maintain service records
- 8 Maintain labor records
- 9 Maintain warranty records
- 10 Explain work requirements
- 11 Inventory supplies and equipment
- 12 Maintain charts, tables, graphs or status boards on work scheduled
- 13 Check job/time cards
- 14 Inspect shop equipment and arrange for maintenance and repair work
- 15 Follow up employee reports of problems or equipment failures
- 16 Draft correspondence
- 17 Orient new employees
- 18 Compute average cost rates for work performed
- 19 Determine actual costs of work completed

20 Write work schedules
21 Write technical reports
22 Plan and implement technical training for employees
23 Evaluate employee progress and performance
24 Interview job applicants
25 Hire workers
26 Fire workers
27 Conduct meetings

Duty C: Performing Housekeeping and Recordkeeping Activities

TASKS:
*1 Develop a work portfolio
*2 Clean and maintain work area and leave in safe condition
*3 Follow tool crib procedures
*4 Report problems to supervisor
5 Complete time cards
6 Complete job status reports
*7 Make equipment failure reports
8 Determine basic maintenance procedures using manuals
9 Plan sequence of work operations
10 Use technical references
11 Participate in a participative management program (Quality Circles)

Duty D: Conducting Shop Operations

TASKS:
1 Answer customer questions
2 Troubleshoot customer problems
*3 Perform public relations activities
4 Maintain records of service tools and equipment
5 Unpack and inspect new equipment
6 Receive and store parts and supplies
7 Update parts catalogs
8 Modify wiring diagrams to reflect repair changes
9 Make out material lists used on each job
*10 Complete work orders

Duty E: Estimating Materials

TASKS:
1 Estimate forming materials
2 Estimate concrete
3 Estimate concrete blocks
4 Estimate rough framing materials
5 Estimate roofing materials
6 Estimate windows
7 Estimate doors and jambs
8 Estimate interior underlayment

9 Estimate interior panels
10 Estimate stairway materials
11 Estimate closet accessories
12 Estimate acoustical ceiling materials
13 Estimate prefabricated cabinets
14 Estimate materials for built-ins
15 Estimate finish hardware
16 Estimate siding
17 Estimate cost of jobs including loss of materials and inflation

Duty F: Preparing Building Site

TASKS:
1 Establish elevation reference points from bench mark or datuum point
2 Establish footing grades
3 Locate and square corners
4 Install batter boards
*5 Set grade stakes
6 Lay out buildings using transit

Duty G: Preparing Foundations and Footings

TASKS:
*1 Build footings
2 Build forms for concrete
*3 Waterproof foundations
4 Construct stud and sheathing wall forms
5 Erect plywood panel wall forms
6 Erect manufactured wall forms
7 Construct stair forms
*8 Strip forms
9 Install beams
10 Install bulkheads
*11 Install keyway for footings and foundations

Duty H: Sharpening Tools

TASKS:
*1 Sharpen chisels
*2 Hone plane irons
3 Sharpen saw blades
4 Sharpen twist drills
5 Sharpen auger bits

Duty I: Installing Rough Framing, New and Existing

TASKS:
*1 Stack lumber
2 Install sill plates
*3 Frame walls
*4 Align and brace walls
5 Construct plywood box beams
*6 Install diagonal wind bracing
7 Frame floor openings
*8 Frame door openings

*9 Frame window openings
10 Frame roof openings
11 Frame built-up stringers
12 Frame cleated stair stringers
*13 Install floor joists
*14 Install cross-bridging
*15 Install ceiling joists
16 Construct post and beam frames
17 Install steel beams
18 Install lally posts
*19 Install backing for hanging fixtures and cabinets
*20 Install exterior wall sheathings
*21 Install battens
*22 Install plyscore sub-floors
23 Install diagonal sub-floors
*24 Install underlayment over sub-floors
25 Install metal studs
26 Set metal door frames for masonry construction
27 Set metal window frames for masonry construction
28 Construct roof trusses
29 Install collar beams
30 Install overhang purlins
31 Install rafter support purlins
32 Install ridgeboards
33 Install common rafters
34 Install tail rafters
35 Install cripple jack rafters
36 Install hip rafters
37 Install hip jack rafters
38 Install valley rafters
39 Install valley jack rafters
40 Install gambrel roof rafters
41 Frame dormers without sidewalls
42 Frame dormers with sidewalls
43 Frame roof saddles
44 Frame snub gables
45 Install gable studs
46 Construct intersecting gable roofs
*47 Install roof sheathings
48 Install and construct reinforced header

Duty J: Installing Roof Components, New and Existing

TASKS: *1 Install roofing felts
2 Install chimney flashs
*3 Install valley flashs
*4 Install composite strip shingles
5 Install shingles over dormers or roof appendages
6 Install roof vents
7 Install ridge vents

8 Install skylights
9 Install wood shingles/shakes
10 Install gutters
11 Install downspouts
12 Install cement shingles
13 Install synthetic shingles
14 Install slate shingles
15 Install tile shingles
16 Install parapet flashs and openings

Duty K: Installing and Repairing Exterior Finishes

TASKS:
1 Construct box cornice
2 Construct rake cornice
3 Case exterior opening
4 Install wood jamb window units
5 Hang exterior doors
6 Install exterior door jambs
7 Install metal corners for aluminum or vinyl siding
8 Install corner boards for wood siding
9 Install wood fascia
10 Install wood soffit
11 Install aluminum fascia
*12 Install aluminum soffit
13 Install prefabricated columns
14 Install garage doors
15 Install metal siding
16 Install vinyl siding
17 Install composition siding
*18 Install prefabricated storm doors
*19 Install prefabricated storm windows
*20 Install drip caps
21 Install bevel siding
22 Install lap siding
23 Install wood shingle siding
24 Install outside corners of wood shingle siding
*25 Install panel siding
26 Construct and install wood louvers
27 Install exterior shutters

Duty L: Installing and Repairing Interior Finishes

TASKS:
*1 Install batt insulations
*2 Install vapor barriers
*3 Install wall panels
*4 Assemble prefabricated cabinets
*5 Install closet accessories
*6 Install interior door jambs
7 Construct built-in cabinets
*8 Install shelves
*9 Install baseboards

10 Install ceiling molds
*11 Install drywalls
*12 Case interior openings
*13 Hang interior doors
*14 Install prehung split jamb door units
15 Install double-acting doors
16 Install folding (accordian) doors
17 Install sliding doors
18 Install bi-fold doors
19 Install pocket doors
*20 Install cylinder locksets
*21 Install mortise locksets
*22 Install door closers
*23 Install door holders
24 Install panic bars
*25 Install flush bolts
*26 Install door plates
*27 Install weatherstripping
*28 Install wall cabinets
*29 Install base cabinets
30 Install recessed medicine cabinets
*31 Install thresholds
*32 Install gypsum lathes
*33 Install corner beading for lathes
34 Install plaster grounds
35 Install parquet flooring
36 Install plank flooring
*37 Install tongue and groove flooring
*38 Install suspended T-grid ceiling
39 Install suspended concealed grid ceiling
*40 Install tongue and groove ceiling tiles

Duty M: Assembling, Constructing and Repairing Stairs

TASKS:
1 Install prefabricated stairs
2 Install disappearing stair unit
3 Construct open riser stairs
4 Construct box stairs
5 Install wood newel post, balusters and railings
6 Install metal newel post and railings
*7 Cut a stringer

Duty N: Using Climbing Equipment

TASKS:
*1 Inspect climbing equipment and scaffolds for safety
*2 Set up ladders
*3 Set up ladder jacks and planks
4 Construct outrigger scaffolds
5 Erect metal scaffolds
6 Set up hanging and swinging scaffolds

7 Erect suspended work platforms
8 Set up mobile and powered scaffolds
9 Construct single-pole scaffolds
10 Construct double-pole scaffolds
11 Set up pump jacks

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Michael P. Conroy
NE Construction Co.

Yhoushua Joshua
Metro Stripes

John Overton
Metro Stripes

Ray Overton
Metro Stripes

Duty A: Applying Safety Practices

TASKS:
1 Comply with shop and equipment safety rules
2 Apply basic emergency first aid techniques
3 Complete accident reports
4 Inspect workplaces for safe working environment
5 Report shop, environmental and equipment safety violations
6 Demonstrate use of fire extinguishers
7 Participate in disaster control exercises
8 Participate in shop safety committees
9 Correct safety hazards
10 Demonstrate cardiopulmonary resuscitation techniques
11 Participate in safety training programs
12 Evaluate personnel safety violations

Duty B: Performing Supervisory Functions

TASKS:
1 Determine availability of machines, supplies and materials
2 Requisition, schedule and distribute supplies and materials
3 Coordinate workers with work to be done
4 Schedule and control shop flow of jobs
5 Maintain files
6 Maintain service records
7 Maintain labor records
8 Maintain warranty records
9 Explain work requirements
10 Inventory supplies and equipment
11 Maintain charts, tables, graphs or status boards on work scheduled
12 Check job/time cards
13 Inspect shop equipment and arrange for maintenance and repair work
14 Follow up employee reports of problems or equipment failures
15 Draft correspondence
16 Orient new employees
17 Compute average cost rates for work performed
18 Determine actual costs of work completed
19 Write work schedules
20 Write technical reports
21 Plan and implement technical training for employees
22 Evaluate employee progress and performance
23 Interview job applicants
24 Hire workers
25 Fire workers
26 Conduct meetings

Duty C: Performing Housekeeping and Recordkeeping Activities

TASKS:
1 Clean and maintain work area and leave in safe condition
2 Follow tool crib procedures
3 Report problems to supervisor

4 Complete time cards
5 Complete job status reports
6 Make equipment failure reports
7 Determine basic maintenance procedures using manuals
8 Plan sequence of work operations
9 Use technical references
10 Participate in a participative management program (Quality Circles)

Duty D: Conducting Shop Operations

TASKS:
1 Answer customer questions
2 Troubleshoot customer problems
3 Perform public relations activities
4 Maintain records of service tools and equipment
5 Unpack and inspect new equipment
6 Receive and store parts and supplies
7 Update parts catalogs
8 Modify wiring diagrams to reflect repair changes
9 Make out material lists used on each job
10 Complete work orders

Duty E: Estimating Materials

TASKS:
1 Estimate forming materials
2 Estimate concrete
3 Estimate concrete blocks
4 Estimate rough framing materials
5 Estimate roofing materials
6 Estimate windows
7 Estimate doors and jambs
8 Estimate interior underlayment
9 Estimate interior panels
10 Estimate stairway materials
11 Estimate closet accessories
12 Estimate acoustical ceiling materials
13 Estimate prefabricated cabinets
14 Estimate materials for built-ins
15 Estimate finish hardware
16 Estimate siding
17 Estimate cost of jobs

Duty F: Preparing Building Site

TASKS:
1 Establish elevation reference points from bench mark
2 Establish footing grades
3 Locate and square corners
4 Install batter boards
5 Set grade stakes
6 Lay out buildings using transit

Duty G: Preparing Foundations and Footings

TASKS:
1 Build footings
2 Build forms for concrete
3 Waterproof foundations
4 Construct stud and sheathing wall forms
5 Erect plywood panel wall forms
6 Erect manufactured wall forms
7 Construct stair forms
8 Strip forms
9 Install beams
10 Install bulkheads
11 Install keyway for footings and foundations

Duty H: Sharpening Tools

TASKS:
1 Sharpen wood chisels
2 Hone plane irons
3 Sharpen circular saw blades
4 Sharpen twist drills
5 Sharpen auger bits

Duty I: Installing Rough Framing

TASKS:
1 Stack lumber
2 Install sill plates
3 Frame walls
4 Align and brace walls
5 Construct plywood box beams
6 Install diagonal wind bracing
7 Frame floor openings
8 Frame door openings
9 Frame window openings
10 Frame roof openings
11 Frame built-up stringers
12 Frame cleated stair stringers
13 Install floor joists
14 Install cross-bridging
15 Install ceiling joists
16 Construct post and beam frames
17 Install steel beams
18 Install lally posts
19 Install backing for hanging fixtures and cabinets
20 Install exterior wall sheathings
21 Install battens
22 Install plyscore sub-floors
23 Install diagonal sub-floors
24 Install underlayment over sub-floors
25 Install metal studs
26 Set metal door frames for masonry construction
27 Set metal window frames for masonry construction
28 Construct roof trusses
29 Install collar beams
30 Install overhang purlins

31 Install rafter support purlins
32 Install ridgeboards
33 Install common rafters
34 Install tail rafters
35 Install cripple jack rafters
36 Install hip rafters
37 Install hip jack rafters
38 Install valley rafters
39 Install valley jack rafters
40 Install gambrel roof rafters
41 Frame dormers without sidewalls
42 Frame dormers with sidewalls
43 Frame roof saddles
44 Frame snub gables
45 Install gable studs
46 Construct intersecting gable roofs
47 Install roof sheathings

Duty J: Installing Roof Components

TASKS:
1 Install roofing felts
2 Install chimney flashs
3 Install valley flashs
4 Install composite strip shingles
5 Install composite shingles on ridge cap
6 Install composite shingles in valley
7 Install composite shingles around roof opening
8 Install shingles over dormers or roof appendages
9 Install roof vents
10 Install ridge vents
11 Install skylights
12 Install wood shingles/shakes
13 Install wood shingles/shakes on ridge cap
14 Install wood shingles/shakes in valley
15 Install wood shingles/shakes around roof opening
16 Install gutters
17 Install downspouts

Duty K: Installing Exterior Finishes

TASKS:
1 Construct box cornice
2 Construct rake cornice
3 Case exterior opening
4 Install wood jamb window units
5 Hang exterior doors
6 Install exterior door jambs
7 Install metal corners for aluminum or vinyl siding
8 Install corner boards for wood siding
9 Install wood fascia
10 Install wood soffit
11 Install aluminum fascia
12 Install aluminum soffit
13 Install prefabricated columns
14 Install garage doors

15 Install metal siding
16 Install vinyl siding
17 Install composition siding
18 Install prefabricated storm doors
19 Install prefabricated storm windows
20 Install drip caps
21 Install bevel siding
22 Install lap siding
23 Install wood shingle siding
24 Install outside corners of wood shingle siding
25 Install panel siding
26 Construct and install wood louvers
27 Install exterior shutters

Duty L: Installing Interior Finishes

TASKS: 1 Install batt insulations
2 Install vapor barriers
3 Install wall panels
4 Assemble prefabricated cabinets
5 Install closet accessories
6 Install interior door jambs
7 Construct built-in cabinets
8 Install shelves
9 Install baseboards
10 Install ceiling molds
11 Hang dryvalls
12 Case interior openings
13 Hang interior doors
14 Install prehung split jamb door units
15 Install double-acting doors
16 Install folding (accordian) doors
17 Install sliding doors
18 Install bi-fold doors
19 Install pocket doors
20 Install cylinder locksets
21 Install mortise locksets
22 Install door closers
23 Install door holders
24 Install panic bars
25 Install flush bolts
26 Install door plates
27 Install weatherstripping
28 Install wall cabinets
29 Install base cabinets
30 Install recessed medicine cabinets
31 Install thresholds
32 Install gypsum lathes
33 Install corner beading for lathes
34 Install plaster grounds
35 Install parquet flooring
36 Install plank flooring
37 Install tongue and groove flooring
38 Install suspended T-grid ceiling

39 Install suspended concealed grid ceiling
40 Install tongue and groove ceiling tiles

Duty M: Assembling and Constructing Stairs

TASKS:
1 Install prefabricated stairs
2 Install disappearing stair unit
3 Construct open riser stairs
4 Construct box stairs
5 Install wood newel post, balusters and railings
6 Install metal newel post and railings

Duty N: Using Climbing Equipment

TASKS:
1 Inspect climbing equipment for safety
2 Set up ladders
3 Set up ladder jacks and planks
4 Construct outrigger scaffolds
5 Erect metal scaffolds
6 Construct hanging and swinging scaffolds
7 Erect suspended work platforms
8 Set up mobile and powered scaffolds
9 Construct single-pole scaffolds
10 Construct double-pole scaffolds

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

EMPLOYABILITY SKILLS

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS:
1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS:
1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.